

22nd Annual Financial Services Forum

Corporates hosting one-on-ones **only** on Wednesday, February 24, 2021

AGNC Investment Corp. (AGNC)

Gary Kain, CEO & CIO

Peter Federico, President & COO

Sean Reid, SVP, Strategy & Corporate Development

Curo Group Holdings Corp. (CURO)

Donald Gayhardt, President & CEO

Roger Dean, CFO

Bill Baker, COO

Intercontinental Exchange (ICE)

Mary Caroline O'Neal, Manager, IR

Warren Gardiner, VP, IR

Ameriprise Financial, Inc. (AMP)

Alicia Charity, SVP, IR

Stephanie Rabe, VP, IR

Essent Group Ltd. (ESNT)

Mark Casale, Chairman, President & CEO

Nasdaq, Inc. (NDAQ)

Michael Ptasznik, CFO

Ann Dennison, CFO

Ed Ditmire, VP, IR

Arch Capital Group Ltd. (ACGL)

Mathew Shulman, CEO, Arch Insurance North America

Donald Watson, EVP, Financial Services

Vinay Misquith, VP, Financial Services

FirstCash, Inc. (FCFS)

Doug Orr, CFO

New Residential Investment Corp. (NRZ)

Michael Nierenberg, Chairman, CEO & President

Nick Santoro, CFO

Athene Holding Ltd (ATH)

Noah Gunn, Head of IR

Alex Pelzar, Director, IR

Franklin (BEN)

Matthew Nicholls, EVP & CFO

New York Community Bancorp, Inc. (NYCB)

Thomas R. Cangemi, President & CEO

John Pinto, EVP & CFO

Cambridge Mobile Telematics

Ryan McMahon, VP of Insurance & Government Affairs

Mohsin Rashid, Director of Corporate & Strategic Development

FinecoBank Banca Fineco S.p.A. (FBK.MI)

Alessandro Foti, CEO

Franca Cavalieri D'Oro, IR

Gianluca Fontanella, IR

Popular, Inc. (BPOP)

Carlos Vazquez, CFO

Paul Cardillo, IRO

Chimera Investment Corporation (CIM)

Mohit Marria, CEO & CIO

Rob Colligan, CFO

Victor Falvo, Head of Capital Markets

Hamilton Lane Incorporated (HLNE)

Erik Hirsch, Vice Chairman

John Oh, IR Manager

Primerica, Inc. (PRI)

Nicole Russell, IR

Credit Suisse HOLT Team

Kaitlyn Korich, Financials Specialist

Houlihan Lokey, Inc. (HLI)

Lindsey Alley, CFO

22nd Annual Financial Services Forum

Agenda:

Wednesday, February 24, 2021

Time (ET)	Track One	Track Two
8:00AM – 8:40AM	Goldman Sachs (GS) David Solomon, CEO	
8:50AM – 9:30AM	Wells Fargo & Company (WFC) Mike Santomassimo, CFO	Deutsche Boerse (DB1) Gregor Pottmeyer, CFO
9:40AM – 10:20AM	Regions Financial Corporation (RF) John Turner, President & CEO David Turner, CFO	Federated Hermes Inc (FHI) Chris Donahue, President & CEO
10:30AM – 11:10AM	Aflac Incorporated (AFL) Fred Crawford, President & COO David Young, Vice President, Investor & Rating Agency	TMX Group Inc. (X.TO) John McKenzie, CEO
11:20AM – 12:00PM	PNC Financial Services Group, Inc. (PNC) Bill Demchak, Chairman, President & CEO Rob Reilly, CFO	Signature Bank (SBNY) Joseph DePaolo, President & CEO Eric Howell, Senior EVP Corporate & Business Development
12:10PM – 12:50PM	State Street Corporation (STT) Eric Aboaf, CFO	Regional Management Corp. (RM) Rob Beck, President & CEO Harp Rana, EVP & CFO
1:00PM – 1:40PM	CBOE Global Markets, Inc. (CBOE) Chris Isaacson, COO Brian Schell, CFO	Enova International, Inc. (ENVA) Steve Cunningham, CFO
1:50PM – 2:30PM	Apollo Global Management, Inc. (APO) Marc Rowan, CEO	Capital One Financial Corporation (COF) Richard Fairbank, CEO
2:40PM – 3:20PM	Greenhill & Co., Inc. (GHL) Scott Bok, Chairman & CEO	MarketAxess Holdings Inc. (MKTX) Chris Concannon, President & COO Tony DeLise, CFO

22nd Annual Financial Services Forum

Agenda:
Wednesday, February 24, 2021 (continued)

Time (ET)	Track One	Track Two
3:30PM – 4:10PM	Credit Suisse Group AG (CS) Brian Chin , CEO, Investment Banking	Two Harbors Investment Corp. (TWO) Bill Greenberg , President & CEO Matt Koeppen , CIO
4:20PM – 5:00PM	Brookfield Asset Management (BAMa) Nicholas Goodman , Managing Partner & CFO	Intact Financial Corporation (IFC.TO) Louis Marcotte , SVP & CFO

22nd Annual Financial Services Forum

Corporates hosting one-on-ones **only** on Thursday, February 25, 2021

The AllState Corporation (ALL)
Mike Demetre, SVP & CFO, Protection Finance
Mark Nogal, Head of IR
Brent Vandermause, Director of IR

BrightSphere Investment Group, Inc. (BSIG)
Suren Rana, CEO

FinecoBank Banca Fineco S.p.A. (FBK.MI)
Alessandro Foti, CEO
Franca Cavalieri D'Oro, IR
Gianluca Fontanella, IR

PJT Partners Inc. (PJT)
Paul Taubman, Chairman & CEO
Helen Meates, CFO
Ji-Yeun Lee, Managing Partner
Sharon Pearson, MD, Head of Investor & External Relations

American Financial Group, Inc. (AFG)
Carl H. Linder III, Co-CEO
S. Carl Linder, Co-CEO
Brian Hertzman, SVP & CFO

Cowen Inc. (COWN)
Jeff Solomon, CEO & Chair
Steve Lasota, CFO
JT Farley, IR

Heritage Insurance Holdings, Inc. (HRTG)
Ernie Garateix, CEO
Arash Soleimani, EVP, IR

Primerica, Inc. (PRI)
Nicole Russell, IR

Athene Holding Ltd (ATH)
Noah Gunn, Head of IR
Alex Pelzar, Director, IR

Credit Suisse Group AG (CS)
Michele Cubic, Head of Americas & Asia
 IR and SRI Business Development
Kinner Kakhani, Global Head of IR and Head of Group Strategy & Development

Metlife, Inc. (MET)
John Hall, SVP, Head of IR
Charlie Douglas, VP, IR
Alicia Goolcharan, Lead Financial Consultant
Amisha Rana, Financial Consultant

RLI Corp. (RLI)
Craig Kliethermes, President & COO
Todd Bryant, CFO
Aaron Diefenthaler, CIO & Treasurer

BlackRock, Inc. (BLK)
Sudhir Nair, Global Head of the Aladdin Business

Credit Suisse HOLT Team
Kaitlyn Korich, Financials Specialist

NMI Holdings Inc. (NMIH)
Adam Pollitzer, CFO
John Swenson, VP, IR & Treasury

Sculptor Capital Management, Inc. (SCU)
Dava Ritchea, CFO
Hap Pollard, CAO
Zachary Ainsberg, IR

Blackstone Mortgage Trust, Inc. (BXMT)
Steve Plavin, CEO

Essent Group Ltd. (ESNT)
Mark Casale, Chairman, President & CEO

Pennymac Mortgage Investment Trust (PMT)
Andrew Chang, COO
Dan Perotti, CFO
Pamela Marsh, EVP, Treasurer
Isaac Garden, FVP, IR
Kevin Chamberlain, EVP, IR

Selective Insurance Group, Inc. (SIGI)
John Marchioni, CEO
Mark Wilcox, CFO

Brighthouse Financial, Inc. (BHF)
David Rosenbaum, Head of IR
Dana Amante, Director, IR

Virtus Investment Partners, Inc. (VRTS)
Michael Angerthal, EVP, CFO

22nd Annual Financial Services Forum

Agenda:
Thursday, February 25, 2021

Time (ET)	Track One	Track Two	Track Three
8:00AM – 8:40AM	Morgan Stanley (MS) Jonathan Pruzan, EVP & CFO	Invesco Ltd. (IVZ) Allison Dukes, Senior MD & CFO	Partners Group Holding AG (PGHN) Hans Ploos van Amstel, CFO
8:50AM – 9:30AM	Citizens Financial Group, Inc. (CFG) Brendan Coughlin, Head of Consumer Banking	Navient Corporation (NAVI) Jack Remondi, CEO	The Hartford Financial Services Group, Inc. (HIG) Chris Swift, Chairman & CEO Beth Costello, CFO
9:40AM – 10:20AM	JPMorgan Chase & Co. (JPM) Jennifer Piepszak, CFO	KKR & Co. Inc. (KKR) Rob Lewin, CFO	W.R. Berkley Corporation (WRB) William R. Berkley, Executive Chairman W. Robert Berkley, Jr., President & CEO
10:30AM – 11:10AM	Discover Financial Services (DFS) John Greene, EVP & CFO	Raymond James Financial, Inc. (RJF) Paul Reilly, Chairman & CEO Paul Shoukry, CFO	Voya Financial, Inc. (VOYA) Rod Martin, CEO Christine Hurtsellers, CEO, Investment Management
11:20AM – 12:00PM	Bank of New York Mellon Corporation (BK) Emily Portney, CFO Bridget Engle, Chief Operations & Technology Officer	AllianceBernstein Holding LP (AB) Seth Bernstein, President & CEO	OneMain Holdings, Inc. (OMF) Doug Shulman, CEO Micah Conrad, CFO
12:10PM – 12:50PM	CME Group Inc. John Pietrowicz, CFO Sean Tully, Global Head of Financials & OTC Products	Ares Management Corporation (ARES) Michael Arougheti, President & CEO Michael McFerran, COO & CFO	Mr. Cooper Group Inc. (COOP) Jay Bray, President, CEO & Chairman Chris Marshall, Vice Chairman & CFO Ken Posner, SVP Strategic Planning & IR
1:00PM – 1:40PM	Citigroup Inc. (C) Mark Mason, CFO	LPL Financial Holdings Inc. (LPLA) Matthew Audette, CFO	Tradeweb Markets Inc. (TW) Lee Olesky, CEO

22nd Annual Financial Services Forum

Agenda:
Thursday, February 25, 2021 (continued)

Time (ET)	Track One	Track Two	Track 3
1:50PM – 2:30PM	Blackstone (BX) Michael Chae, CFO	Truist Financial Corporation (TFC) Bill Rogers, President & COO	The Hanover Insurance Group, Inc. (THG) Jack Roche, CEO Jeff Farber, CFO
2:40PM – 3:20PM	Air Lease Corporation (AL) Greg Willis, CFO	Victory Capital Holdings, Inc. (VCTR) David Brown, Chairman & CEO Mathew Dennis, Chief of Staff	EverQuote, Inc. (EVER) John Wagner, CFO Joseph Sanborn, SVP, Corporate Development & Strategy
3:30PM – 4:10PM	Annaly Capital Management Inc. (NLY) David Finkelstein, CEO & CIO	A Deep Dive into Financial Services M&A and Regulation with Wachtell, Lipton, Rosen & Katz Edward Herlihy, Co-Chairman, Partner Richard Kim, Partner	Brown & Brown, Inc. (BRO) Andy Watts, EVP & CFO Jim Hays, Vice Chairman
4:20PM – 5:00PM	Elevate Credit, Inc. (ELVT) Jason Harvison, President & CEO Chris Lutes, CFO	Redwood Trust, Inc. (RWT) Chris Abate, CEO	

22nd Annual Financial Services Forum

Corporates hosting one-on-ones **only** on Friday, February 26, 2021

Alliance Data Systems Corporation (ADS)

Tim King, CFO
Brian Vereb, Senior IR Manager

Credit Suisse HOLT Team

Kaitlyn Korich, Financials Specialist

Intermediate Capital Group PLC (ICP.L)

Vijay Bharadia, CFO & COO
Chris Hunt, Head of IR

The Travelers Companies, Inc. (TRV)

Abbe Goldstein, SVP, IR
Giovanni Astolfi, VP, IR
Colleen Naber, Sr. Analyst, IR

Ameriprise Financial, Inc. (AMP)

Alicia Charity, SVP, IR
Stephanie Rabe, VP, IR

DWS Group GmbH & Co. KGaA

Asoka Wöhrman, CEO
Claire Peel, CFO
Oliver Flade, Head of IR
Jana Zubatenko, IR Manager
Maneli Farsi, IR Manager

Lazard Ltd. (LAZ)

Ashish Bhutani, Vice Chairman & CEO of Lazard Asset Management

T. Rowe Price (TROW)

Celine Dufetel, COO & CFO

Argo Group International Holdings, Ltd. (ARGO)

Brett Shirreffs, Head of IR

GCM Grosvenor Inc. (GCMG)

Michael Sacks, Chairman & CEO
Stacie Selinger, Head of IR
Pam Bentley, Managing Director
Brian Malkin, Associate

MGIC Investment Corporation (MTG)

Mike Zimmerman, SVP IR

Blackstone Mortgage Trust, Inc. (BXMT)

Steve Plavin, CEO

Goosehead Insurance, Inc. (GSHD)

Mark Colby, CFO
Dan Farrell, VP Capital Markets

PennyMac Financial Services, Inc. (PFSI)

Andrew Chang, COO;
Dan Perotti, CFO
Pamela Marsh, EVP, Treasurer
Isaac Garden, FVP, IR
Kevin Chamberlain, EVP, IR

Blackstone (BX)

Weston Tucker, Head of IR
Michael Needham, SVP, Shareholder Relations

Heritage Insurance Holdings, Inc. (HRTG)

Ernie Garateix, CEO
Arash Soleimani, EVP, IR

Primerica, Inc. (PRI)

Nicole Russell, IR

Cohen & Steers, Inc. (CNS)

Matt Stadler, CFO
Joe Harvey, President

Starwood Property Trust, Inc. (STWD)

Jeff Dimodica, President
Andrew Sossen, COO
Rina Paniry, CFO
Zach Tanenbaum, Head of IR

22nd Annual Financial Services Forum

Agenda:
Friday, February 26, 2021

Time (ET)	Track One	Track Two
8:00AM – 8:40AM	SLM Corporation (SLM) Jonathan Witter , CEO	3i Group plc (III) Simon Borrows , Chief Executive Julia Wilson , Group Finance Director
8:50AM – 9:30AM	Bank of America Corporation (BAC) Paul Donofrio , CFO	FinecoBank Banca Fineco S.p.A. (FBK.MI) Alessandro Foti , CEO
9:40AM – 10:20AM	Affiliated Managers Group, Inc. (AMG) Tom Wojcik CFO	Ally Financial (ALLY) Jenn LaClair , CFO
10:30AM – 11:10AM	American International Group, Inc. (AIG) Mark Lyons , EVP & CFO Sabra Purtill , SVP, Deputy CFO & Treasurer	Semi-Transparent ETF Panel Gregory Friedman , Head of ETF Management & Strategy, Fidelity Investments Dan McCabe , Chief Officer, Precidian Investments Simon Goulet , Co-Founder, Blue Tractor Group Mo Sparks , Director, Exchange Traded Products, NYSE-Natixis Stuart Thomas , Founding Principal, Precidian Investments
11:20AM – 12:00PM	Interactive Brokers Group, Inc. (IBKR) Thomas Peterffy , Chairman	Encore Capital Group, Inc. (ECPG) Ashish Masih , CEO
12:10PM – 12:50PM	The RIA Vision: A Conversation with Focus Financial Partners and a Select Group of its Firms Rudy Adolf , Founder, CEO & Chairman, Focus Financial Jim Shanahan , CFO, Focus Financial Chris Laing , Senior Managing Director & Partner, CornerStone Partners Michael Eckton , CEO & Managing Partner, Crestwood Advisors Todd Gelfand , CEO, Gelfand, Rennert & Feldman Tony Abbiati , Co-Founder & CEO, SCS Financial Michael Spector , Co-Founder & CEO, Vista Wealth Management	Root, Inc (ROOT) Daniel Rosenthal , CFO

22nd Annual Financial Services Forum

Agenda:
February 26, 2021 (continued)

Time (ET)	Track One	Track Two
1:00PM – 1:40PM	Stifel Financial Corp. (SF) Ron Kruszewski , CEO Jim Marischen , CFO	Cambridge Mobile Telematics Ryan McMahon , VP of Insurance & Government Affairs
1:50PM – 2:30PM	Ellington Financial Inc. (EFC) Mark Tecotzky , Co-CIO JR Herlihy , CFO	Tikehau Capital SCA (TKOO) Mathieu Chabran , Co-founder Louis Igonet , Head of IR Theodora Xu , IR Associate
2:40PM – 3:20PM	ESG Panel Michelle Dunstan , Global Head of Responsible Investing, Alliance Bernstein Jennifer Anderson , CO-Head of Sustainable Investment & ESG, Lazard	Oaknorth Rishi Khosla , Co-Founder & CEO
3:30PM – 4:10PM	Digital Asset Panel Jonathan Steinberg , Founder & CEO, WisdomTree Financial Dan Doney , CEO & Co-Founder, Securrency James Robinson , Founder & General Partner, RRE Ventures	Kinsale Capital Group, Inc. (KNSL) Michael Kehoe , President & CEO
4:20PM – 5:00PM	ECN Capital Corp (ECN) Steve Hudson , CEO John Wimsatt , Corporate Development	