Northern Trust and Fi-Tek Pre-Conference Workshops: September 12

NORTHERN TRUST *presents:*

FOCUS 2016

SEPT. 13 & 14 CHICAGO

INVESTMENT RESEARCH & ASSET MANAGEMENT CONFERENCE

KEYNOTE SPEAKER Todd Buchholz

Expand your investment knowledge, engage with industry experts and explore innovative solutions for effectively managing your investment practice when you join us at the Loews Chicago Hotel this autumn for FOCUS 2016.

CONFERENCE LOCATION

Loews Chicago Hotel
455 North Park Drive
Chicago, IL 60611
312-840-6600 | 877-868-8232
Group Code for
Preferred Room Rate: NTC916

CONFERENCE FEE

FOCUS 2016 attendance is included for FOCUS clients as a component of the FOCUS Investment Research service.

Other Interested Parties: $995
*Please Note: Should you make the decision to become a FOCUS client by 12/31/16, the **FOCUS 2016** registration fee will be deducted from your 2017 FOCUS Investment Research subscription fee. A one time deduction of $995 will apply.*

CE CREDITS

CFP: Approved for 16 CE credits
CFTA: Approved for 12.25 credits
CIMA®, CIMC® and CPWA®:
Credit hours pending
CPE: Conference participants can earn up to 19 CPE credits in Economics, Finance, Information Technology, Management Services, Business Management & Organization and Communications and Marketing Fields of Study.

ADDITIONAL INFORMATION

Prerequisites: None
Who Should Attend: Portfolio Managers, Investment Officers, Research Analysts, Trust Officers
Advanced Preparation: None
Program Level: Intermediate
Delivery Method: Group Live

CONFERENCE HIGHLIGHTS

- Meet and engage with Northern Trust Senior Management and investment professionals including Bob Browne, CFA®, *Chief Investment Officer,* Jim McDonald, *Chief Investment Strategist,* Matt Peron, *Division Head, Global Equities,* Carl Tannenbaum, *Chief Economist,* Colin Robertson, *Head of Global Fixed Income,* and Shundrawn Thomas, *Head of Funds and Managed Accounts,* as well as other investment management experts and industry peers from around the country.
- Enjoy two days of objective commentary and analysis on the economic and market environments, as well as constructive strategies for identifying and capitalizing on global investment opportunities and managing risk.
- Connect the dots between the economy, markets and politics with Keynote Speaker Todd Buchholz former White House Director of Economic Policy, Harvard economics professor and best-selling author (Latest book - *The Price of Prosperity: Why Nations Fail and How to Renew Them*).
- Choose breakout sessions from three distinct tracks offering the opportunity to dive deeper into the issues and topics that are most relevant to your business objectives:

  1. *Equities In Depth — Listen to Northern Trust's team of Senior Equity Analysts as they discuss the rationale behind our equity sector views and Equity Guidance List ratings*
  2. *Portfolio Management — Explore the art and science of developing effective portfolio solutions to meet a range of client investment goals and risk tolerances*
  3. *Practice Management — Discover practical strategies to win new business, boost client satisfaction and improve practice efficiency — all to help drive profitable growth*

NEW EVENT!

ANALYST ROUNDTABLE SESSIONS

Enjoy the opportunity to speak one-on-one with our experts and engage in detailed discussion to answer any specific questions you may have.

REGISTER TODAY AT northerntrust.com/FOCUS2016

To learn more, contact The Northern Solutions Group at 855-645-8303 | NorthernSolutionsGroup@ntrs.com

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AT THIS CONFERENCE, PARTICIPANTS WILL:

- Identify, analyze and understand the factors driving the current market and economic environments and analyze potential opportunities and threats.
- Understand how client portfolios will behave in the current environment.
- Explore methods for evaluating companies.
- Assess the implications of the outcome of the 2016 presidential election for investors.
- Identify current and emerging drivers within each equity market sector.
- Examine trends in ESG integration in investment portfolios.
- Discover strategies for leveraging financial planning services to grow firm AUM.
- Understand how to develop and execute a successful M&A strategy.
- Understand the role different investment factors (e.g., quality, value, low volatility, momentum and dividend yield) play in delivering specific investment outcomes.
- Learn how to uncover and analyze potential opportunities within the emerging markets.
- Learn how to identify and evaluate stocks for inclusion in a core equity portfolio.
- Gain insights regarding the implications of the new Money Market Reform regulations.
- Understand current financial services marketing best practices and the tools available to marketers.
- Understand and evaluate the current, historic and future fixed income landscapes.
- Understand robo-advisory and its impact on the investment advice arena.

CONFERENCE POLICIES

Refunds and Cancellations:

FOCUS Clients: Attendance at FOCUS2016 is a component of the FOCUS Research subscription. No additional fee is charged. FOCUS clients may cancel at any time without penalty.

Registered Non-Client: Attendees: Requests for refunds must be received in writing by August 12, 2016. No refunds will be granted after August 12, 2016.

For more information regarding refund, complaint and/or program cancellation policies, please contact our offices at 855-645-8303 | NorthernSolutionsGroup@ntrs.com.

NATIONAL REGISTRY OF CPE SPONSORS

The Northern Trust Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors at www.learningmarket.org.

ABOUT FOCUS INVESTMENT RESEARCH

A Northern Trust FOCUS Investment Research subscription provides access to impartial and authoritative insights from our diverse and extensive team of global investment professionals. We have built one of the broadest buy-side research footprints in the asset management industry to provide intelligence that is directly applicable to portfolio decision-making.

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