

# SMIFC—Student Managed Investment Fund Consortium

## Conference Agenda November 3 - 4, 2016

Thursday November 3, 2016

- 12:00 pm - 1:10 pm      **Registration – HMSU, Dede I**
- 1:10 pm - 1:20 pm      **Opening Remarks – HMSU, Dede I**  
Dr. Brien Smith, Dean, Scott College of Business/Co-Founder of SMIFC  
Dr. Tarek Zaher, Professor of Finance/Co-Founder of SMIFC
- 1:20 pm – 2:35 pm      **Session 1 – Panel Discussion – HMSU, Dede I\***  
**Topic:** *Value of Teams in Financial Planning*
- Randall K. Minas, CFP, Executive Vice President, Financial Advisor, City Securities Corporation
- Shawn Sabau, CFP, Senior Vice President, Financial Advisor, City Securities Corporation
- Elisha Davis Porterfield, CFP, Financial Advisor with the Private Client Group of City Securities Corporation
- Sarah Tallent, Registered Financial Associate with the Private Client Group of City Securities Corporation
- Veda Williams-Ross, Registered Financial Associate with the Private Client Group of City Securities Corporation
- Topic:** *Opportunities for Women in Investment Planning*
- Elisha Davis Porterfield, CFP, Financial Advisor with the Private Client Group of City Securities Corporation
- 2:35 pm - 2:45 pm      **BREAK**

(\* Catapult Credit session)

2:45 pm - 3:45pm

**Session 2– Keynote Speaker, HMSU, Dede I\***

**Topic:** *From Option Basics to Institutional Option Trading*

Kevin P. Davitt, Senior Instructor, Chicago Board Options Exchange- The Options Institute

3:45 pm – 4:00 pm

**BREAK**

4:00 pm - 4:45 pm

**Session 3 – Panel Discussion, HMSU, Dede I  
Student Managed Investment Fund (SMIFC) Faculty and Student  
Research Activities.**

Team 1:

Indiana State University

Dr. Tarek Zaher, Indiana State University

Dr. Reza Houston, Indiana State University

Kurt Kedrick, Indiana State University

Team 2: Colby-Sawyer College

*Student-Managed Investment Funds: A Survey of Student*

*Demographics, Fund Performance, Policies and Transparency*

Dr. Chris Kubik

Mr. Trenton Bonk, Colby-Sawyer College

Ms. Chi Nguyen, Colby-Sawyer College

4:45 pm - 5:00 pm

**BREAK**

5:00 pm - 6:00 pm

**Session 4 – Scott College of Business**

**SMIFC Partners Organizational Meeting (SMIFC Partners advisors only), Scott College of Business, Federal Hall, Room 303**

(\* Catapult Credit session)

6:30 pm

**Dinner (SMIFC Partners Advisors and Delegates), Scott College of Business  
(Court Room Federal Hall, Rm. 223)**

**Friday, November 4, 2016**

8:45 am - 9:30 am

**Session 5 – Workshop, Scott College of Business, Minas Center  
Federal Hall, Rm. 123**

**Topic:** *Uses and Applications of thinkorswim Platform*

Kevin Hincks, Senior Specialist, Co-Host Swim Lessons, Host of Options Hour, TD Ameritrade

Susan Newman, Trading, TD Ameritrade

9:30 am - 9:50 am

**BREAK**

9:50 am – 10:30 am

**Session 6 – Panel Discussion – Court Room-Federal Hall, Rm. 223**

**Topic:** *Asset Management from a Fiduciary Standpoint*

John Ayre, Senior Portfolio Manager, Asset Management,  
First Financial Bank

Benjamin Dye, Portfolio Manager, Asset Management  
First Financial Bank

10:30 am - 10:45 am

**BREAK**

10:45 am - 11:30 am

**Session 7– Keynote Speaker, HMSU, Dede I\***

**Topic:** *Three Vital Concepts to Understanding & Trading Options for Beginners*

Kevin Hincks, Senior Specialist, Co-Host Swim Lessons, Host of Options Hour

11:30 am – 12:45 pm

**LUNCH, HMSU, Dede II/III**

12:45 am -1:30 pm

**Session 8 – Panel Discussion, HMSU, Dede I**

**Student Managed Investment Fund (SMIFC) Current practices in Portfolio Management, Financial Analysis and Asset Allocation**

Moderator: Dr. Charles Boughton, Truman State University

Panelists:

SMIFC Team 1 University of Arkansas – Fort Smith

SMIFC Team 2 Truman State University

1:30 pm – 2:15 pm

**Session 9 - Panel Discussion, HMSU, Dede I**

**Student Managed Investment Fund (SMIFC) Current practices in Portfolio Management, Financial Analysis and Asset Allocation**

Moderator: Dr. Mahmoud Haddad

Panelists:

SMIFC Team 3 Indiana State University

SMIFC Team 4 University of Tennessee - Martin

2:15 pm - 2:20 pm

**Closing Remarks/Adjournment, HMSU, Dede I (Group Photo)**

**Dr. Tarek Zaher, Professor of Finance, Scott College of Business**

(\* Catapult Credit session)