2017 Annual Investment Forum

Featured Speakers

Liz Ann Sonders

Senior Vice President, Chief Investment Strategist

Charles Schwab & Co., Inc.

Liz Ann Sonders has a range of investment strategy responsibilities including U.S. market and economic analysis, and asset allocation recommendations for individual, corporate, and institutional investors. She is a contributor to Schwab's advice publications and videos and a keynote speaker at many Schwab client and corporate events. Liz Ann makes regular TV appearances on CNBC, Bloomberg TV, and Fox Business News, and is regularly quoted in publications such as The Wall Street Journal, Barron's, and The New York Times. Liz Ann is also a Senior Vice President and member of the Investment Committee at Windhaven Investment Management, Inc., which oversees Windhaven's research initiatives and investment decisions. Liz Ann earned a BA in economics and political science from the University of Delaware and an MBA in finance from Fordham University's Gabelli School of Business.

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Mihir P. Worah

Chief Investment Officer, Asset Allocation & Real Return

PIMCO

Mr. Worah is CIO Asset Allocation and Real Return and a managing director in the Newport Beach office. He is a member of the Investment Committee and the Executive Committee, and oversees portfolio management for the U.S. He is a generalist portfolio manager who manages a variety of fixed income, commodity and multi-asset portfolios. Prior to joining PIMCO in 2001, he was a postdoctoral research associate at the University of California, Berkeley, and the Stanford Linear Accelerator Center, where he built models to explain the difference between matter and anti-matter. In 2012 he co-authored "Intelligent Commodity Indexing," published by McGraw-Hill. He has 15 years of investment experience and holds a Ph.D. in theoretical physics from the University of Chicago.

Sonal Desai, Ph.D

Senior Vice President & Director of Research

Templeton Global Macro

Sonal Desai, Ph.D., is a senior vice president and director of research for Templeton Global Macro. Templeton Global Macro offers global, unconstrained investment strategies through a variety of investment vehicles ranging from retail mutual funds to unregistered, privately offered hedge funds. Dr. Desai is a portfolio manager on a number of funds, including Templeton Global Bond Fund and Templeton Global Total Return Fund. She is responsible for shaping the team's research agenda of in-depth global macroeconomic analysis covering thematic topics, regional and country analysis, and interest rate, currency and sovereign credit market outlooks. Dr. Desai holds a Ph.D. in economics from Northwestern University and a B.A. in economics from Delhi University. She is part of the Templeton Global Bond Fund portfolio management team named Morningstar's Fixed Income Manager of the Year in Canada in 2013.

Harry W. Segalas

Managing Partner & Chief Investment Officer

HS Management Partners

Harry founded HS Management Partners in 2007. Prior to the formation of HSMP, he served as Chairman, CEO, and Chief Investment Officer of W.P. Stewart & Co., Inc. In addition to overseeing the firm's U.S. investment team, Harry directly managed $4 billion of institutional and high-net-worth client assets worldwide. From 1987 until joining W.P. Stewart in 1990, he was the Senior Packaged Food Analyst at Shearson Lehman Hutton. Harry began his career in 1982 as a research analyst at L.F. Rothschild, Unterberg & Towbin. He has a B.A. in Political Science and History from Tufts University.