

# 15<sup>th</sup> Annual Fall Investment Symposium

Tuesday, October 17, 2023  
7:30 am – 1:30 pm

The Maryland Club  
1 East Eager Street, Baltimore, MD 21202

This will be a hybrid event.

If attending in person, please email us at:  
[thejkmeekgroup@msgraystone.com](mailto:thejkmeekgroup@msgraystone.com)

If attending virtually, please register below:  
[https://morganstanley.zoom.us/webinar/register/WN\\_05qGsVIIsm-VU5E5qgdW7w](https://morganstanley.zoom.us/webinar/register/WN_05qGsVIIsm-VU5E5qgdW7w)

Hosted by Graystone Consulting Baltimore  
The J. K. Meek Group

**James K. Meek, CIMA®**

Managing Director, Wealth Management  
Institutional Consulting Director

**Russell M. Lagreca, CIMA®, CFP®, CRPS®**

First Vice President, Wealth Management  
Institutional Consultant

**David Murphy**

Senior Vice President, Wealth Management  
Portfolio Management Director

**Allan D. House**

Vice President, Wealth Management  
Institutional Consultant

**Lee E. Eybel, CFP®**

Institutional Consultant  
Financial Planning Specialist

**Martin F. Domres**

Executive Director, Wealth Management  
Financial Advisor

Please RSVP by September 27, 2023

Phone: (410) 736-5367

# Directions

## The Maryland Club

1 East Eager Street  
Baltimore, MD 21202  
Phone: (410) 727-2323

Google Map for Maryland Club Click [HERE](#)

## From the South

Take Route 95 North to 395 North into Baltimore past Oriole Park  
Turn right at Pratt Street  
Stay in left lane and turn left on to Charles St.  
Head north approximately 1.5 miles  
Club parking lot is caddy corner from the club's entrance on Eager Street

## From the North

From 83 Southbound  
Take Maryland Avenue Exit  
At light turn left on Maryland Avenue  
Turn left on Eager Street

## Parking

Available on the Club premises and additional parking is available on the lefthand side caddy corner from the Club's entrance on Eager Street

# Agenda

7:30 – 8:00 am	Registration, Breakfast & Networking
8:00 – 8:10 am	<b>Opening Remarks</b> James K. Meek, Institutional Consulting Director, Graystone Consulting
8:10 – 9:00 am	<b>Featured Speaker</b> <i>Protecting your Assets and Information in the Digital Age</i> Rachel Wilson, Head of Wealth Management Data Security & Infrastructure Risk, Morgan Stanley
9:00 – 9:45am	<b>Look for a special invitation in your email!</b>
9:45 – 10:00am	Refreshments & Networking
10:00am – 10:45 am	<b>Global Equities</b> <i>There Is No Alternative (TINA) to the Magnificent 7: Opportunities in Global Equities</i> George Evans, CIO, Global Equities, Senior Portfolio Manager, Invesco Sudhir Nanda, Vice-President, Portfolio Manager, T. Rowe Price Sam Peters, Managing Director, Portfolio Manager, ClearBridge Investments
10:45 – 11:30 am	<b>Global Fixed Income</b> <i>Higher for Longer: Is Fixed Income Investable Again?</i> Hemant Baijal, Head Multi-Sector Portfolio Management, Global Debt, Invesco Brian Kennedy, Co-Portfolio Manager, Full Discretion Team, Loomis Sayles Jeffrey Rosenberg, Managing Director, BlackRock
11:30 – 12:20 pm	<b>Featured Speaker</b> <i>A Guide to the Markets</i> David Lebovitz, Managing Director, Global Market Strategist, J.P. Morgan
12:20 – 12:30 pm	<b>Closing Remarks</b> Allan D. House, Institutional Consultant, Graystone Consulting
12:30 – 1:30 pm	Lunch with Speakers

# Speaker Biographies

## Global Equities Panel

**George Evans** is Chief Investment Officer for Global Equities at Invesco. Additionally, he is a Senior Portfolio Manager for the International Growth and International Diversified strategies. Mr. Evans joined Invesco when the firm combined with OppenheimerFunds in 2019. Prior to joining OppenheimerFunds in 1990, he served for three years as a securities analyst and portfolio manager in the international equities department at Brown Brothers Harriman. He has been in the industry since 1987.

Mr. Evans earned a BA and MA degree from Oxford University and an MBA from the Wharton School of the University of Pennsylvania. He is a Chartered Financial Analyst® (CFA) Charterholder.

**Sudhir Nanda**, CFA is the portfolio manager of the Integrated US Small-Cap Growth Equity Strategy in the U.S. Equity Division at T. Rowe Price. He is chairman of the strategy's Investment Advisory Committee and a member of the Investment Advisory Committee of the US Structured Active Mid-Cap Growth Equity Strategy. Sudhir is an executive vice president of the Integrated Equity Funds, Inc. He also is a vice president of T. Rowe Price Group, Inc.

Sudhir's investment experience began in 1999, and he has been with T. Rowe Price since 2000, beginning in the U.S. Equity Division. Prior to this, Sudhir was employed by Pennsylvania State University as an assistant professor of finance. He also was employed by Tata Steel in India in financial and general management positions.

Sudhir earned a B.A., with honors, in mathematics from St. Stephen's College in Delhi, India; an M.B.A. from the Indian Institute of Management in Calcutta, India; and a Ph.D. in finance from the University of Massachusetts, Amherst. He also has earned the Chartered Financial Analyst® designation. Sudhir served on the Financial Accounting Standards Board's User Advisory Council and has had several articles published in the areas of investments, mergers and acquisitions, and international finance. His papers have appeared in *The Journal of Portfolio Management*, *Financial Management*, and the *Handbook of Equity Style Management*.

**Sam Peters**, CFA co-manages the Value Equity Strategy and the All-Cap Value Strategy at ClearBridge. He has 29 years of investment industry experience. Sam joined a predecessor organization in 2005. Previously, Sam served as a Portfolio Manager and Health Care Sector Team Leader for Fidelity Management & Research. Sam joined Fidelity in 1999 as a bank analyst. He founded Samuel M. Peters Investment Advisors, an independent advisory firm. Sam was a financial consultant for Eppler, Guerin & Turner.

Sam serves on the Board of Trustees for the Gilman School in Baltimore, Maryland, is a board member of the Merchant Livestock Company and is a board member emeritus of the College of William & Mary's Endowment Committee. Sam also serves on the Board of Trustees of the Santa Fe Institute, a leading, multi-disciplinary research laboratory dedicated to developing and advancing solutions to complex problems in physical, biological and social systems.

Sam earned a BA in economics from the College of William & Mary and an MBA from the University of Chicago. He received the CFA designation in 1997.

# Speaker Biographies

## Global Fixed Income Panel

**Hemant Baijal** is Head of Multi-Sector Portfolio Management - Global Debt at Invesco. He leads the Global Debt team and also serves as a Senior Portfolio Manager.

Mr. Baijal joined Invesco when the firm combined with OppenheimerFunds in 2019. He joined OppenheimerFunds in 2011 and led the Global Debt team, in addition to being the lead portfolio manager on a number of strategies including International Bond, Global Strategic Income, Emerging Market Local Debt, and Global Unconstrained Bond. Before joining OppenheimerFunds, Mr. Baijal co-founded Six Seasons Global Asset Management, where he served as partner and portfolio manager with a focus on fixed income macro strategies. Before his role at Six Seasons, he was a partner and portfolio manager at Aravali Partners, LLC., and Havell Capital Management, LLC., where he focused on fixed income macro and relative value strategies. Earlier in his career, Mr. Baijal was a senior portfolio manager for international, global, and multi-sector fixed income portfolios at Neuberger Berman. He has also held positions at Banca Di Roma, First Boston Corporation, and Merrill Lynch and Co. Mr. Baijal earned a BA degree from the University of Delhi and an MBA from Columbia University.

**Brian Kennedy** is a co-portfolio manager of the firm's multisector institutional strategies and funds at Loomis Sayles.

Brian started his investment industry career in 1990 as a senior fund accountant at the Boston Company. He joined Loomis Sayles in 1994 as a securitized and government bond trader. He transitioned to the high yield trading desk in 2001, where he initiated Loomis Sayles' trading of bank loans, while also trading high yield convertibles, derivatives, and equities. Brian first joined the full discretion investment team as product manager in 2009. In 2013 he was promoted to co-portfolio manager of the investment grade bond products, and in 2016 he was promoted again to co-portfolio manager of the multisector suite of products. Brian earned a BS from Providence College and an MBA from Babson College.

**Jeffrey Rosenberg**, CFA, Managing Director, leads active and factor investments for mutual funds, institutional portfolios, and ETFs within BlackRock's Systematic Fixed Income ("SFI") portfolio management team.

In this role he serves as a member of the SFI Investment and Executive Committees and as a senior portfolio manager for a number of our investment products including the Systematic Multi-Strategy fund. Mr. Rosenberg's service with the firm dates back to 2011, when he joined the Fundamental fixed income group as Chief Investment Strategist for fixed income. In 2016, this role transitioned into the BlackRock Investment Institute. His responsibilities included helping to develop BlackRock's strategic and tactical views on sector allocation within fixed income, currencies, and commodities. Prior to joining BlackRock, Mr. Rosenberg spent nearly 10 years at Bank of America Merrill Lynch as the Chief Credit Strategist coordinating strategy across all fixed income, securitized assets, credit, FX and commodities. In addition, Mr. Rosenberg specialized in quantitative credit modeling and developed the first commercialized credit portfolio analytics system from a dealer firm.

# Speaker Biographies

## Featured Speaker

**Rachel Wilson** is a Managing Director of Morgan Stanley and Head of Wealth Management Data Security and Infrastructure Risk. Her team of security professionals is responsible for protecting all sensitive client data from any type of theft, loss or compromise. She also oversees the resilience of Wealth Management's critical infrastructure and the continuity of core business processes at times of turbulence. Additionally, Rachel supervises the client fraud risk program, which institutes technical and business controls to help prevent unauthorized access to or misuse of client funds. As a senior subject matter expert, Rachel regularly advises Wealth Management leadership and clients on the cyber threat landscape and mitigation strategies.

From 2017-2020, Rachel served as the first-ever Head of Wealth Management Cybersecurity. In this role, Rachel advised senior business and technology leaders on a range of cybersecurity issues, including secure code development standards, secure network architecture, vendor relationships, advanced persistent threat (APT) detection and mobile security. Her team drove innovation for new cybersecurity and authentication technology in the pursuit of protecting the integrity and confidentiality of firm and client data. In 2019, Rachel was recognized by Morgan Stanley Wealth Management as part of the MAKERS Class, a program that honors women who serve as groundbreakers, innovators and advocates. She was also named one of the Top Women in WealthTech 2020 by ThinkAdvisor.

Prior to joining the firm in 2017, Rachel spent 15 years at the National Security Agency (NSA), where she held several key senior executive-level leadership positions. Between 2008 and 2010, she ran NSA's counterterrorism operations and led a global enterprise in detecting and disrupting terrorist plotting against the U.S. and its allies. Between 2010 and 2012, Rachel served as NSA's Chief of Operations in the U.K., working out of the U.S. Embassy in London. In this role, she worked with U.K. intelligence services to counter terrorist and cyber threats to the 2012 Olympics. Returning to the U.S. in 2012, Rachel spent nearly five years leading NSA's cyber exploitation operations as the Deputy and then Chief of the Remote Operations Center within NSA's Tailored Access Operations. In this capacity, she led the planning and execution of thousands of cyber exploitation operations against a wide array of foreign intelligence, military and cyber targets, and served as the committing official for many of NSA's highest risk and most important intelligence gathering activities.

**David Lebovitz**, Managing Director, is a Global Market Strategist on the J.P. Morgan Asset Management Global Market Insights Strategy Team. In this role, David is responsible for delivering timely market and economic insights to clients across the country. Since joining the team, David has helped build the Market Insights program in the United Kingdom and Europe, has appeared on both Bloomberg TV and CNBC, and is often quoted in the financial press.

David joined J.P. Morgan in 2010. Prior to joining the firm, David was a Research Analyst at Kobren Insight Management. At Kobren, David was responsible for small and mid-cap equity research, and worked alongside the CIO and other analysts to construct model portfolios for investors of various risk tolerances. David obtained a B.A. in Political Science and Philosophy, with a concentration in Leadership Studies, from Williams College in 2009. He earned a dual-MBA degree from Columbia University and London Business School in 2015.

**We would like to thank our panelists and sponsors for their participation in this year's  
Investment Symposium.**

# Disclosures

The guest speaker(s) is neither an employee nor affiliated with Morgan Stanley Wealth Management. Opinions expressed by the guest speaker(s) are solely their own and do not necessarily reflect those of Morgan Stanley. Individuals should consult with their tax/legal advisors before making any tax/legal-related investment decisions as Morgan Stanley and its Financial Advisors do not provide tax/legal advice.

The appropriateness of a particular investment or strategy will depend on an investor's individual circumstances and objectives. Principal value and return of an investment will fluctuate with changes in market conditions.

Investors should carefully consider the investment objectives and risks as well as charges and expenses of a mutual fund before investing. To obtain a prospectus, contact your Financial Advisor or visit the fund company's website. The prospectus contains this and other important information about the mutual fund. Read the prospectus carefully before investing.

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