



Due Diligence Meeting Agenda

The Ritz-Carlton

Key Biscayne | Miami, FL 33149

MONDAY, JUNE 10, 2024

2:00 – 2:15 pm <i>Salon I & II</i>	Welcome	Blake Moore, <i>President & CEO, Touchstone</i>
2:15 – 2:45	Wells Fargo Update	Dan Moorman, <i>Head of Packaged Investment Products Client and FA Directed Advisory Programs</i> Dani Wright, <i>National Sales Divisional Sales Director - Southeast</i>
2:45 – 3:20	Market Overview	Erik Aarts, <i>CIMA, Sr. Fixed Income Strategist, Touchstone</i> Brian Cheyne, <i>CFA, Sr. Investment Strategy Specialist, Touchstone</i>
3:20 – 3:30	<i>Break</i>	
3:30 – 4:20	Ares Capital Management Panel: The Outlook for High Yield	Chris Mathewson, <i>Partner & Portfolio Manager, Ares</i> Erik Aarts, <i>CIMA, Sr. Fixed Income Strategist, Touchstone</i>
4:20 – 4:30	<i>Break</i>	
4:30 – 5:15	Evaluating Active Managers with Active Share & SCOPE	Tim Paulin, <i>CFA, Sr. VP Investment Research, Touchstone</i>
5:15 – 6:00	Practice Analysis Review: Investment Focus	Tommy Grout, <i>Divisional VP, Touchstone</i> Tom Singler, <i>Manager, Investment Strategy Specialist, Touchstone</i>
6:00 pm	Wrap Up	Ben Alge, <i>CFA, Divisional VP, Touchstone</i>
6:00	<i>Reception</i>	
6:45 <i>Fountain Courtyard</i>	<i>Dinner</i>	

TUESDAY, JUNE 11, 2024

7:00 – 8:00 am <i>Salon I & II</i>	<i>Breakfast</i>	
8:00 – 8:10	Meeting Overview	Ben Alge, <i>CFA, Divisional VP, Touchstone</i>
8:10 – 9:00	The London Company Panel: The Mid Cap Gap	Brian Campbell, <i>CFA, Principal and Portfolio Manager, TLC</i> Tim Bray, <i>Divisional VP, Touchstone</i>
9:00 – 9:10	<i>Break</i>	
9:10 – 10:00	Sands Capital Management Panel	Tom Trentman, <i>CFA, Sr. Portfolio Manager, Research Analyst</i> Kevin Murphy, <i>CFA, Client Relations</i> Steve Seid, <i>CFA, Divisional VP, Touchstone</i>
10:00 – 10:10	<i>Break</i>	
10:10 – 11:00	Bramshill Investments Panel: Finding Relative Value in Fixed Income	Art DeGaetano, <i>CIO and Founder, Bramshill Investments</i> Erik Aarts, <i>CIMA, Sr. Fixed Income Strategist, Touchstone</i>
11:00 – 11:15 am	Touchstone Story	Mary Mock, <i>Sr. VP and Head of Distribution, Touchstone</i>
11:15 am	Lunch – Box Lunch Buffet <i>We invite you to stay and enjoy lunch in the meeting room</i>	

Agenda subject to change