



Touchstone Investments®
DISTINCTIVELY ACTIVE®

Due Diligence Meeting Agenda

Fairmont Century Plaza

2025 Avenue of the Stars • Los Angeles, CA 90067

WEDNESDAY, NOVEMBER 9, 2022

5:30 – 6:00 pm <i>Gold Lounge, Lobby Level</i>	Welcome Reception
6:00 – 8:30 <i>Brentwood, Century Level P1</i>	Dinner Keynote Presentation: The Intersection of Credit Markets Jennifer Kozicki, <i>Partner, Co-Head of Ares Global Liquid Credit</i>

THURSDAY, NOVEMBER 10, 2022

7:30 – 8:30 am <i>Gold Lounge, Lobby Level</i>	Breakfast
8:30 <i>Brentwood, Century Level P1</i>	Introduction Steve Seid, CFA, <i>Divisional VP – West, Touchstone Investments</i>
8:30 – 9:00	Distinctively Active Blake Moore, <i>President & CEO, Touchstone Investments</i> Steve Seid, CFA, <i>Divisional VP – West, Touchstone Investments</i>
9:00 – 9:30	Market Overview Richard “Crit” Thomas, CFA, CAIA, <i>Global Market Strategist, Touchstone Investments</i>
9:30 – 9:45	Break
9:45 – 10:30	Ares Edge Kapil Singh, CFA, <i>Partner & PM, US Liquid Credit, Touchstone Ares Credit Opportunities Fund PM</i> Erik Aarts, CIMA, <i>Senior Fixed Income Strategist, Touchstone Investments</i>
10:30 – 11:30	Ares Research Insights Patrick Maloney, <i>VP, Investor Relations, Ares Management</i> Ben Bonsall, <i>Managing Director, Sr. Analyst</i> Andrew Chen, <i>Managing Director, Sr. Analyst</i> Ruben Valverde, CFA, <i>Managing Director, Co-Head of Quantitative Risk & Research</i> <i>Ares Management</i>
11:30 – 12:00 pm <i>Gold Lounge, Lobby Level</i>	Lunch



THURSDAY, NOVEMBER 10, 2022 *(CONTINUED)*

12:30 – 1:00 pm	Active Share and Skill, Conviction, Opportunity, Patience and Expenses <i>Tim Paulin, CFA, Sr. Vice President, Investment Research, Touchstone Investments</i>
1:00 – 1:45	Going Where the Growth Is <i>Kevin Murphy, CFA, Senior Director, Client Relations, PM</i> <i>Wesley Johnston, CFA, Select Growth PM</i> <i>Katherine Okon, Research Analyst</i> <i>Sands Capital Management</i>
1:45 – 1:55	Break
1:55 – 2:40	Capitalizing on Two Market Inefficiencies: Time and Risk <i>Tim Paulin, CFA, Sr. Vice President, Investment Research, Touchstone Investments</i> <i>Brian Campbell, CFA, Principal, Co-Lead, PM Mid Cap, The London Company</i>
2:40 – 2:55	Strategies for Growing a More Sustainable and Profitable Business <i>Steve Seid, CFA, Divisional VP – West, Touchstone Investments</i>
2:55 – 3:40	Targeted Client Acquisition <i>John Choate, Former Navy Seal</i>
3:40 – 3:45	Summary <i>Steve Seid, CFA, Divisional VP – West, Touchstone Investments</i>
5:30 pm	Dine-Arounds <i>You will receive your assigned restaurant before the end of the meeting day</i>