



Due Diligence Meeting Agenda

Fairmont Century Plaza

2025 Avenue of the Stars
Los Angeles, CA 90067
November 9 – 10, 2022

Wednesday, November 9th

5:30 – 6:00pm PT Welcome Reception

6:00 – 8:30pm PT	<i>Dinner</i> Keynote Presentation: The Intersection of Public and Private Credit	Jennifer Kozicki Partner, Co-Head of Ares Global Liquid Credit PM Touchstone Ares Credit Opportunities Fund
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Thursday, November 10th

(Steve Seid, Divisional Vice President – West, Moderator)

7:30 – 8:15am PT *Breakfast*

8:30 – 9:00am PT	Introduction	Blake Moore, President & CEO Mary Mock, SVP and Head of Distribution Touchstone Investments
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9:00 – 9:30am PT	Market Overview	Richard “Crit” Thomas, CFA Global Market Strategist Touchstone Investments
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9:30 – 9:40am PT *Break*

9:40 – 10:00am PT	Liquid Credit Expertise at Ares	Patrick Maloney VP, Investor Relations
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10:00 – 10:45am PT	Ares Research Insights	Chris Mathewson, Partner & PM, US Liquid Credit PM, Touchstone Ares Credit Opportunities Fund Panel TBD
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Research professional panel (energy, healthcare, QR2) providing their perspective on risk and reward in the market today as well as the power of the Ares Platform

10:45 – 11:30am PT	Ares Angle	Kapil Singh, Partner & PM, US Liquid Credit PM, Touchstone Ares Credit Opportunities Fund Erik Aarts, Senior Fixed Income Strategist Touchstone Investments
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Q&A session moderated by Erik Aarts with focus on relating prior Ares sessions to the Touchstone Ares Credit Opportunities Fund



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Thursday, November 10th (continued)

11:30am – 12:20pm	<i>Lunch</i>	
12:30 – 1:00pm	Active Share and Skill, Conviction, Opportunity, Patience and Expenses	Tim Paulin, CFA SVP, Touchstone Investments
1:00 – 1:45pm	Going Where the Growth Is Sands Capital Portfolio Manager Panel	Kevin Murphy, Moderator Wes Johnston, CFA, PM Select Growth Danielle Menichella, CFA, PM International Growth Neil Kansari, PM Emerging Markets Growth
1:45 – 1:55pm	<i>Break</i>	
1:55 – 2:40pm	Capitalizing on Two Market Inefficiencies: Time and Risk	The London Company Brian Campbell, PM Mid Cap
2:40 – 2:55pm	Strategies for Growing a More Sustainable and Profitable Business	Mary Mock Steve Seid
2:55 – 3:40pm	Targeted Client Acquisition	John Choate Former Navy Seal
3:40 – 3:45 pm	Summary	Mary Mock
5:30pm	<i>Dinner/Dine-Arounds</i>	