

Student Managed Investment Fund Consortium Conference

October 2nd - 3rd



INDIANA STATE
UNIVERSITY

SCOTT COLLEGE OF BUSINESS



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SMIFC Website



Welcome to the Student Managed Investment Fund Consortium (SMIFC) Conference! We are delighted to host you for the eleventh annual conference and continue our tradition of advancing excellence in Student Managed Investment Fund (SMIF) practices.

Since our inception in 2013 with just 18 members, the SMIF Consortium has flourished to now include 165 members. This remarkable growth underscores our dedication to empowering financial planners and investors like you, and we are eager to share our vision for the future of the consortium as well as the investment industry.

We are honored to welcome back several distinguished speakers. **Matt Moran** – Previous Head of Index Insights at CBOE Options Institute, who brings extensive global experience in investor education. **Tyler Wood, CMT** – Managing Director of the CMT Association, specializing in technical analysis and risk management. **Tiffany Dolby** – Relationship Manager at Charles Schwab & Co., with a wealth of experience in sales and business development. **Buff Dormeier, CMT**, Chief Technical Analyst for Kingsview Partners, who is a pioneer in the use of volume in technical analysis, and has won a number of national and international awards for his publications on the use of volume in investment decision-making.

We are also thrilled to introduce new participants who promise to enrich your experience: **Charles Bobrinskoy**, **Rob Langrick**, and **Greg Laurence**. Charles Bobrinskoy is the vice chairman and head of investment group for Ariel Investments and has extensive experience in the application of behavioral finance within investment management while often appearing among CNBC and Bloomberg media. Rob Langrick, CFA, CIPM, is the general manager of the CFA program at CFAI. In turn, Greg Laurence, CFP, CIMA, is the director and head of RIA Distribution supporting Schwab Asset Management. Continuing to bring strong investment insight, we are pleased to present expert knowledge through our workshops and panel discussions involving **Grant Podolski, CFA, CAIA**, at LGIM America and **Blake Shaffer, CFA**, from Jones Lang LaSalle. Please know that we greatly appreciate all who take part at the conference in support of helping students learn, make connections, and develop professionally.

Finally, we are excited to welcome and feature **Eric Garrett, Founder and CEO, of The Garrett Companies** to the SMIFC Conference. The Garrett Companies is a multifamily development, construction, and management firm consistently recognized as one of the fastest-growing privately held companies in America with in excess of \$3.5 billion in property valuation. As the conference title sponsor, The Garrett Companies is proud to support student success and leadership in investment management for the SMIFC.

This year's agenda is filled with outstanding sessions and unique opportunities which will be both inspiring and beneficial for students at our member institutions. Enjoy the conference, and we wish you a future filled with success.



Tarek S. Zaher, Ph.D.
Director, SMIFC Conference
Scott College of Business



Terry Daugherty, Ph. D.
Dean
Scott College of Business
Indiana State University

Who We Are

Student Managed Investment Fund Consortium

The Student Managed Investment Fund Consortium (SMIFC) provides a forum among member institutions to share student managed investment fund best practices in investment management and organization administration. Activities of the consortium emphasize graduate and undergraduate student education, research, and leadership

About Indiana State University

Indiana State University, established in 1865, is a public university that embraces its mission to educate the leaders of tomorrow with focus on research, experiential learning, and civic engagement. Its five colleges offer courses leading to undergraduate and graduate degrees and certificates in arts and sciences, business, education, health and human services, and engineering and technology.

Scott College of Business



The Scott College of Business is dedicated to providing an internationally accredited professional education to qualified students at both the undergraduate and master's levels. Our primary focus is to prepare students to take leadership roles in both public and private organizations. The College supports, encourages, and produces applied and educational research, development of relationships with the business community, and service to the region and the professions.

In 1980, Indiana State University's business programs first earned accreditation through the Association to Advance Collegiate Schools of Business (AACSB International) and has continued to maintain accreditation for more than 30 years. AACSB International accreditation is the hallmark of excellence in management education. Institutions that earn this accreditation confirm their commitment to quality and continuous improvement through a rigorous and comprehensive peer review. Fewer than 5 percent of business schools worldwide earn this distinction.



Dr. Tarek Zaher

SMIFC Conference Chair
Indiana State University



Dr. Tarek Zaher has held a number of professional positions within the industry and provided consulting services to a number of international institutions, including the World Bank, the William Davidson Institute at the University of Michigan, the Academy for Educational Development in the United States, and the Ministry of Work in Dubai. He has also offered a number of seminars in investment and international financial management at institutions around the world

Dr. Zaher is the supervisor of the Investment Club at Indiana State University. He also manages and supervises other international portfolios for individuals and institutions. Dr. Zaher's research has been published in numerous prestigious professional and scholarly journals, including the Journal of Financial Research and Journal of Banking and Finance. Dr. Zaher received three research awards and one research certificate of excellence from professional conferences. He was also recognized by the Scott College of Business with the Faculty Research Award in 2002 and with the Exemplary Service Award in 2004.

Dr. Terry Daugherty

Dean, Scott College of Business, Indiana State University



Dr. Terry Daugherty is Dean of the Scott College of Business at Indiana State University (ISU) and an expert in digital marketing, consumer psychology, and behavioral research. Having served on the faculty at Vanderbilt University, the University of Texas at Austin, and the University of Akron, Terry has authored more than 70 intellectual contributions while presenting his work at leading academic conferences worldwide. He is the past Editor-in-Chief of the Journal of Interactive Advertising for the American Academy of Advertising and Co-Editor of a special issue on neuromarketing for the European Journal of Marketing. Terry completed his BA degree at Western Kentucky University, his MA at the University of Alabama, and his PhD at Michigan State University.

Dr. Jin Park

Chair, Scott College of Business
Indiana State University



Dr. Jin Park joined the Scott College of Business in fall 2009 and has been the chair of Accounting, Finance, Insurance and Risk Management Department since March 2019. He teaches classes relating to risk management, property and liability insurance, and employee benefits. His research areas of interest include asset-liability management, performance, and organizational efficiency. He has awarded Best in Track Award three years in a row (2007 – 2009) at Academy of Finance. He earned his Ph.D. from Temple University, Philadelphia, PA in 2003, and was an assistant professor (2003-2009) at Illinois Wesleyan University, Bloomington, IL.

Agenda

Day 1: Wednesday, October 2, 2024

11:30 a.m. - 12:30 p.m. – Check in

Hyatt Regency McCormick, first floor, Grant Park Room

12:30 p.m. - 12:50 p.m. – Opening Remarks

Hyatt Regency McCormick, first floor, Grant Park Room

Dr. Tarek Zaher, Professor of Finance/Co-Founder and Managing Director of SMIFC, Scott College of Business, Indiana State University
Dr. Terry Daugherty, Dean, Scott College of Business, Indiana State University

Session 1: 12:50 p.m. - 1:50 p.m. – Panel Discussion, The Value of CFA Designation to Finance Majors

Hyatt Regency McCormick, first floor, Grant Park Room

Grant Podolski, CFA, CAIA, LGIM America
Blake Shaffer, CFA, Jones Lang Lasalle

Session 2: 1:50 p.m. - 2:40 p.m. – Volume Factor Momentum.

Hyatt Regency McCormick, first floor, Grant Park Room

Buff Dormeier CMT, Chief Technical Analyst | Kingsview Partners

2:40 p.m. - 2:50 p.m. – Break

Session 3: 2:50 p.m. - 3:40 p.m. – Python in the CFA Program and the latest CFA Program updates

Hyatt Regency McCormick, first floor, Grant Park Room

Rob Langrick, CFA, CIPM, General Manager of the CFA program at CFAI.

Session 4: 3:35 p.m. - 3:50 p.m. –Microsoft Office Credentialing for LinkedIn SIMnet Training & Assessment for Microsoft Office Applications

Hyatt Regency McCormick, first floor, Grant Park Room

Ted Krischak, Director, SIMnet-McGraw-Hill Education

Session 5: 3:50 p.m. - 6:00 p.m. – Corporate Connection & SMIFC Teams Poster Session Competition

Hyatt Regency McCormick, first floor, Lincoln Park Room

3:50 p.m. – 4:10 p.m. – Poster Session Judges Evaluation Visit

4:10 p.m. - 6:00 p.m. – Poster Session Students Visit

4:20 p.m. - 5:00 p.m. – Poster Session Judges Meeting

5:00 p.m. – 6:00 p.m. – Faculty and Partner Appreciation Reception presented by The Garrett Companies

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park Room

6:00 p.m. - 7:30 p.m. – Dinner - Distinguished Speaker Eric Garret, Founder and CEO of The Garrett Companies

Hyatt Regency McCormick, first floor, Grant Park Room

Eric Garrett, CEO of The Garrett Companies

Day 2: Thursday, October 3, 2024

Session 6: 9:00 a.m. - 9:50 a.m. – The Value of Technical Analysis in the Investment Process

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park room

Tyler Wood, CMT, Managing Director, CMT Association

9:50 a.m. - 10:00 a.m. – Greetings and Thank you

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park room

Dr. Mike Godard, President, Indiana State University

Session 7: 10:00 a.m. - 10:50 a.m. - Applying Behavioral Finance at Ariel Investments

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park Room

Charlie Bobrinsky, Vice Chairman, Ariel Investments

10:50 a.m. - 11:00 a.m. – Break

Session 8: 11:00 a.m. - 11:50 a.m. – Usage of CBOE's Proprietary Derivatives Products

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Ballroom

Matt Moran, Previous Head of Index Insights, CBOE Options Institute

Session 9: 11:50 a.m. - 1:00 p.m. – Lunch, and Announcement of Competition Awards

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park Room

The competition winners will be announced, and awards will be presented, followed by brief presentations by winning teams.

- Poster Session Competition Awards: Sponsored by CMT Association.
- Financial Analysis Competition Awards: Sponsored by Indiana State University

Session 10: 1:00 p.m. - 1:40 p.m. – Pillars of Wealth Management

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park Room

Tiffany Dolby, Relationship Manager, Advisor Services Relationship Management, Charles Schwab & Co.

Session 11: 1:40 p.m. - 2:20 p.m. – Personal branding in Wealth Management.

Greg Laurence, CFP, CIMA, Director | Head of RIA Distribution, Schwab Wealth & Asset Management Solutions

Hyatt Regency McCormick, first floor, Hyatt Conference Center, Grant Park Room

Session 12: 2:30 p.m. - 3:30 p.m. – Visit to FRB Chicago and CBOE

Speakers

Eric Garrett

Founder and CEO of The Garrett Companies



As Founder and CEO of The Garrett Companies, Eric Garrett directs the strategic planning and operations of the Company. Eric began his career in multifamily brokerage and quickly moved to the development side of the business. Since 1999, Eric has owned,

developed, and delivered over 73 projects in 17 states totaling over 17,000 units and in excess of \$3.5 billion in valuation. The Garrett Companies is repeatedly recognized as a Best Place to Work in the USA for its culture, benefits, and people-centric mindset (Fortune, Inc.). The Garrett Companies continues to rank as one of the fastest-growing privately held companies in America and is a consistent leader in the real estate development industry in terms of projects under development, construction, and revenues. (Inc. 500, 2016-2024).

Eric earned his degree from Indiana State University. He is on the Board of Directors of the National Multi Housing Council as well as The Garrett Family Foundation.

Tyler Wood, CMT

Managing Director, CMT Association



Tyler is a familiar voice to many as the co-host of Fill the Gap: the official podcast of the CMT Association and a regular guest in University classrooms through the Academic Partner Program. Tyler is also the co-founder of GoNoGo Charts, a data visualization tool that simplifies

market analysis to remove emotional bias from investment decisions. Prior to joining the CMT Association, Tyler worked in management consulting and publishing. As an executive manager over the past 20 years, he has managed product, brand communications, and sales teams to drive top-line revenue growth for public, private, and non-profit entities. When he is not immersed in markets, Tyler is hiking the Adirondacks with his family or playing percussion for various bands along the east coast. Tyler graduated from Macalester College and received his MBA from the Kelley School of Business at Indiana University.

Charlie Bobrinsky

Vice Chairman, Ariel Investments



Charlie manages Ariel's focused value strategy—an all-cap, concentrated portfolio of U.S. stocks. He also spearheads Ariel's thought leadership efforts and takes an active role in representing Ariel's investment strategies with prospective investors, clients and major media. Prior to joining Ariel in

2004, Charlie spent 21 years as an investment banker at Salomon Brothers and its successor company Citigroup, where he rose to managing director and head of North American investment banking branch offices. Charlie actively serves the Chicago community, sitting on the corporate boards of State Farm Mutual Automobile Insurance Company and ACI Worldwide as well as the boards of the Big Shoulders Fund, La Rabida Children's Hospital Foundation, the Abraham Lincoln Presidential Library Foundation and the Chicago Club. He also teaches monthly investing classes at two Chicago inner-city schools. Charlie graduated with an AB in economics from Duke University and earned an MBA from the University of Chicago.

Grant Podolski, CFA, CAIA

Client Investment Strategist, LGIM America



Grant is a Client Strategist at LGIM America, a part of Legal & General Group, one of the top ten asset managers in the world by size. He is a CFA charterholder, Chartered Alternative Investment Analyst (CAIA) charterholder, and holds a Series 3 license registered with the NFA. He is involved in the CFA Society of Chicago and Out in Finance.

Grant's role and career has focused on large institutional client engagement and ensuring custom investment solutions successfully achieve clients' long-term objectives. Alongside clients, Grant designs, implements, and ensures the success of these custom investment solutions for some of the largest asset owners in the world. He primarily focuses on investment grade fixed income and a variety of derivatives-based strategies, with a focus on liability driven investing, exposure management, and interest rate hedging.

Grant joined LGIM America in 2020. Prior to LGIM America, Grant spent seven years in various positions at NISA Investment Advisors in St. Louis, focusing on Liability Driven Investment portfolio management and derivatives solutions. Grant earned a BS in Business Administration: Concentrations in Finance and Accounting, from Saint Louis University in St. Louis, MO.

Rob Langrick, CFA, CIPM

Chief Product Advocate
CFA Institute



Rob Langrick, CFA, CIPM, is General Manager of the CFA Program based out of the New York office. He was previously Head of Practice Analysis, overseeing annual curriculum updates to the CFA Program. Before joining CFA Institute, he lead Bloomberg's finance education division where he built and launched Bloomberg's certification product. He began his career as a sell-side equity research analyst in London and after earning his MBA from Dartmouth worked in the private equity diligence unit of Bain & Company in New York.

Blake Shaffer, CFA

Director, Capital Markets, Jones Lang Lasalle



Blake is a Director in the Corporate Capital Markets practice group advising corporate clients on capital strategies to optimize their financial alternatives regarding their real estate portfolios. Blake's clientele ranges from Fortune 10 companies to lower-middle-market private equity sponsored portfolio companies. With a strong corporate finance acumen and background, Blake's expertise includes in-depth knowledge of capital structuring, financial impact analyses, and financial reporting analysis for certain real estate transactions. Blake advises clients on executing sale-leasebacks, net lease sales, lease monetization transactions, acquisition sale leasebacks, build-to-suits, and other esoteric structured financing including synthetic lease and credit tenant lease transactions. Blake's single-tenant expertise spans all major real estate asset classes including industrial, office, retail and data centers.

Prior to joining JLL, Blake worked at MB Financial Bank, a Chicago-based regional bank (now Fifth-Third Bank), as a commercial credit analyst supporting the Commercial Real Estate lending groups at the bank. Blake was responsible for gathering and analyzing due diligence, financial and quantitative analysis, and credit underwriting for \$100M+ of commercial real estate loans in multiple markets in his first year.

Blake received his B.B.A. in Finance from the Tippie College of Business as well as a Certificate of Leadership Studies at the University of Iowa. Blake earned his Charter from the CFA Institute in September 2019. Blake is a licensed real estate broker in the state of Illinois (Lic. No. 475.184604). Blake is a member of the CFA Society of Chicago, the CFA Society of Chicago Member Engagement Advisory Group, and the Tippie College of Business Young Alumni Mentor Program.

Buff Dormeier, CMT

Partner and Chief Technical Analyst, Kingsview Partners



Buff Dormeier, CMT® provides four important roles to our clientele that of a financial advisor, consultant, analyst, and a portfolio manager. Armed with proprietary indicators and investment programs, Buff dynamically advises affluent and institutional clientele on strategies to help meet their specific investment objectives in what are often uncertain investment climates. As an advisor, Buff has been named a “Best in State Wealth Advisor” by Forbes*. As an analyst in 2007, Buff’s technical research was awarded the Charles H. Dow Award**, distinguishing him as the only financial advisor to thus far win the Award. The Charles H. Dow Award is considered one of the most important recognitions in the field of technical analysis. As an accomplished portfolio manager applying advanced technical/quant analysis, some simply refer to Buff as “the geek”.

However, Buff considers himself to be an evangelist of sorts. He enjoys sharing his investment theories as a foremost expert on volume analysis presenting at international conferences such as TradeStation’s World Conference, Latin America’s Portfolio Manager’s Conference, and the World Money Show.

An award-winning author (2012’s Technical Analyst Book of the Year / Trader Planet’s Top Book Resource 2011), Buff literally wrote the book on “Investing with Volume Analysis” partnering with the Financial Times Press, Pearson Publishing and the Wharton School. Buff’s research has been further featured with press partners including Barron’s, Stock’s & Commodities, Futures and Active Trader magazines, The Financial Times, C-NBC, Market Watch as well as a variety of technical journals. Buff is featured in “Technical Analysis and Behavior Finance in Fund Management” – a European book comprised of interviews with 21 esteemed portfolio managers.

Buff is a former Fort Wayne / Indiana Marathon champion. Although his competitive distance training is on hold, Buff still enjoys a good long run on occasion. Buff is a member of the Chartered Market Technicians Association and Emmanuel Community Church. He is married to his beloved bride Kathy, father of two adored children Hadassah and Kaleo, and best friend to his Rhodesian Ridgeback Dutch.

Greg Laurence, CFP®, CIMA, AIF®, CMFC

Director, Head of RIA Distribution, Charles Schwab & Co., Inc



Previously, Mr. Laurence was the regional director of the RIA sales group covering the Midwest Territory, assisting in the business development of new mutual funds, ETFs, and CITs to RIAs and bank trust channels. Prior to joining Schwab in 2009, Mr. Laurence was vice president of client service and marketing at Oberweis Asset Management where he worked with both institutional and intermediary retail clients. He also spent a year at Wilshire Associates as a vice president in the analytics division. Prior to that, he spent almost six years with DWS Group (Scudder Investments) in a number of positions in mutual fund distribution, most recently as the vice president of product management for Scudder’s value equity products.

Mr. Laurence earned a Master of Business Administration from the University of Wisconsin MBA Consortium and a Bachelor of Arts in political science from the University of Iowa. He completed the Certificate Program in Financial Planning at DePaul University in Chicago and is a CERTIFIED FINANCIAL PLANNER™ practitioner. Mr. Laurence is also a Certified Investment Management Analyst® (CIMA) and an Accredited Investment Fiduciary® (AIF) designee. He completed the Investment Management Education Program at University of Chicago Booth School of Business and earned the Chartered Mutual Funds Counselor designation. Mr. Laurence holds Series 6, 7, 24, 63, and 65 licenses.

Matt Moran

Head of Index Insights, Cboe Global Markets



Matt Moran is Head of Index Insights at Cboe Global Markets. In this role, Moran is focused on the exchange’s educational efforts for pension funds, Registered Investment Advisors (RIAs), mutual funds, and other institutional investors. He has traveled to more than 100 cities worldwide to educate investors and deliver financial presentations. Prior to joining Cboe, Moran served as Trust Counsel at Harris Bank and Vice President at the Chicago Mercantile Exchange. He is an associate editor of The Journal of Beta Investment Strategies and has written articles for several financial publications, including The Journal of Trading and The Journal of Alternative Investments. Moran holds MBA and JD degrees from the University of Illinois at Urbana-Champaign.

Tiffany Dolby

Relationship Manager, Advisor Services Relationship Management, Charles Schwab & Co., Inc



Tiffany Dolby is a Relationship Manager within the Advisor Services organization of Schwab Institutional where she works closely with Registered Investment Advisors. She helps owners grow their business, compete in this market place, and be successful among their peers.

Prior to joining Advisor Services, Tiffany worked as a Branch Manager on the North Shore of Chicago where she was responsible for 8 Financial Advisors and 2 Operational Staff. She was responsible for helping the advisors grow their practice, increase community awareness, and grow & maintain client relationships. Prior to that Tiffany held various roles within the company mainly focusing on leadership, business development, sales and wealth management.

This is Tiffany's 15th year with Charles Schwab & Co. Her first 10 years were in the southern suburbs of Denver, Colorado, then in 2017 she relocated to Chicago to serve as the North Shore Branch leader and managed the Winnetka and Kenilworth branches.

Tiffany graduated from Purdue University, Krannert School of Management, located in West Lafayette, IN with a degree in economics. She holds the series 7, 63, 66, 9, and 10 financial licenses.

As a native of San Diego, she loves the sun, outdoors, mountains and being near or in a large body of water. Currently, she and her dog Luna can be found walking around Chicago looking for new restaurants & patios.

Presenting Sponsor



The Garrett Companies is a full-service multifamily development, construction, and management firm based in Indiana, Colorado, & Tennessee. The company specializes in the multifamily industry and boasts a diverse array of project successes in multiple markets including new construction, infill, and mixed-use developments. The Garrett Companies has been involved in the development of greater than 50+ projects totaling over 17,000 apartment homes across 17 states.



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New SMIFC Members



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The SMIFC will organize a conference each year to provide networking opportunities for its members. Students will assist in the organization of the conference and will participate by presenting their practices in investment management and/or organization administration. Student research and white papers will be maintained in the SMIFC resource archive. The conference will also spotlight a number of industry participants who will speak on topics of interest to SMIFC members. Opportunities exist for panel discussions with students, advisors, and industry partners. The material presented on the SMIFC website or during the annual conference is for educational purposes only and is not a recommendation or endorsement of any particular investment or investment strategy. Past performance does not indicate or guarantee future success. Returns will vary and all investments involve risks, including loss of principal.

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