Strategic Global Advisors®

2024 ACADEMIC ADVISORY BOARD

Embracing Change
Looking Ahead to a New Economic Order

Wednesday August 21, 2024

Newport Beach Country Club

One Clubhouse Drive

Newport Beach CA 92550

REGISTER HERE

Embracing Change
Looking Ahead to a New Economic Order

SCHEDULE OF EVENTS

8:00 a.m. Breakfast

9:00 a.m. Business session begins | Welcome

SESSION ONE: The outlook for corporate sustainability standards: are there opportunities to add value to client portfolios?

Professor Richard Sloan, SGA's Direct of Investment Research *and a renowned author and researcher will be joined by individuals with expertise in sustainability standards, investment analysis, and global energy outlook*.

10:45 a.m. Refreshment break

11:00 a.m. Business session resumes

SESSION TWO: Will the current state of commercial real estate impact US and/or Global financial institutions?

Brett Darragh, CFA, Senior Fundamental Analyst at SGA*, will be joined by academics and individuals with industry expertise who will share their analysis and observations about commercial real estate and the implications for financial institutions in the US and globally.*

12:30 p.m. Lunch

1:30 p.m. Business session resumes

SESSION THREE: Artificial Intelligence in Finance: is it "Man vs. Machine" or "Man + Machine"?

Professor Sean Cao, University of Maryland*, a leading academic in the area of AI applications in finance, coined this topic in his most recent research and will present his findings alongside SGA's own research and work in this area.*

2:45 p.m. Refreshment break

3:00 p.m. Business session concludes

CLOSING: Future Vision for SGA Research

5:00 p.m. Cocktails, dinner, and Bocce Ball

THINGS TO KNOW

Contact a member of SGA's Client Service team

Ulana Blahy | 949-662-2224

Chauntelle Zwonitzer | 949-662-2232

Lelia Kennedy | 949-662-2233

Dress Code

Business sessions: Business Attire

Dinner and Bocce Ball: Feel free to bring a change of clothes for Bocce, though please be mindful of Country Club restrictions, more information can be found here.

Airports

John Wayne Airport Orange County (SNA) *~8 miles from Newport Beach*

Long Beach Airport (LGB) *~25 miles from Newport Beach*

Los Angeles International Airport (LAX) *~44 miles from Newport Beach*

Hotels

Marriott VEA Newport Beach *0.9 mile from Newport Beach Country Club ($$$)*

Hyatt Regency Newport Beach *1 mile from Newport Beach Country Club ($$$)*

Sonesta Irvine *6.4 miles from Newport Beach Country Club ($$)*

BIOGRAPHIES

Professor Richard Sloan, PhD, Director of Investment Research

Professor Sloan originally joined SGA's Advisory Board in 2018 and at the start of 2023 became the firm's Director of Investment Research in an exclusive consulting arrangement. As Director of Investment Research, his involvement with the Fundamental and Quantitative research teams expanded, leveraging his expertise in an effort to further refine SGA's investment process and incorporate new insights from academia. Professor Sloan is also a professor of accounting, finance and business economics at the University of Southern California. From 2006 to 2009, he was a managing director in equity research at Barclays Global Investors (since acquired by Blackrock). Professor Sloan is a pioneer in the field of quantitative investing. His research has received numerous awards, including the American Accounting Association's Seminal Contributions to the Accounting Literature Award (2016). Professor Sloan holds a PhD in Accounting and Finance from the University of Rochester and a BCom(Hons) from the University of Western Australia.

Brett Darragh, CFA, Senior Fundamental Analyst

Mr. Darragh joined SGA in 2019, where his responsibilities include performing fundamental reviews of new ideas generated by the quantitative Alpha Model. Most recently, he was an equity research associate at Northland Securities in Newport Beach, CA where he primarily focused on the energy sector. Prior to Northland Securities, he was an associate financial analyst at TCW and Space Systems Loral. Mr. Darragh received his BS in Business Administration from Cal Poly San Luis Obispo.

Professor Sean Cao, PhD, Director and Co-founder of the AI Initiative for Capital Market Research, University of Maryland

Dr. Sean Cao, Director and Founding Faculty of the AI Initiative for Capital Market Research and tenured Associate Professor at the University of Maryland, is also affiliated with Harvard Business School (D^3 Institute). His research is featured in media like *Financial Times*, *CNBC*, and *Bloomberg*, and honored with best paper awards, including from *Review of Financial Studies*. Dr. Cao champions AI's impact in finance and accounting, acknowledged by Deloitte's Initiative for AI and Learning (DIAL), SEC, and Japan's Central Bank. He promotes accessible learning on AI, fintech, and accounting through an AI textbook and short-term PhD seminars. Dr. Cao also contributes as a guest associate editor at *Management Science* and co-chaired conferences with the *Review of Financial Studies* (dual submission) on Fintech and Machine Learning. Explore more at his website.