

The 36th Annual Carter Investment Conference Emotional Bias & Its Effect on Disciplined Investing

October 10, 2015

Cityplace Conference Center

2711 N. Haskell at Central Expressway

[Click Here to RSVP](#)

7:30 a.m. [Registration](#)

8:00 a.m. [Breakfast & 1st Keynote: Income Investing in a Post-Quantitative Easing World](#) · Eagle Fixed Income Strategies. As interest rates remain at historically low levels, income-oriented investors have found it more difficult to meet their objectives. James Camp's presentation will address the challenges of generating income in a low-yield environment.

9:10 a.m. [Planning for Health Care in Retirement](#) · Nationwide Financial. Health care is the second largest expense for retirees after housing. We'll explore Medicare myths and facts to determine how much the average retiree will need to cover rising health care costs.

[Income-Producing Real Estate – A Global Story](#) · James Alpha Management. This presentation will focus on the advantages of investing in global, versus domestic, real estate. The current market provides some attractive opportunities and possible "extra" income.

[The Disciplined Discovery of Value](#) · Keeley Asset Management. Inefficiencies which occur as a result of corporate restructuring can often result in value that average investors mistakenly fail to see. Learn about why value may exist and how to find investment opportunities.

10:15 a.m. [2nd Keynote: 2015 Ten Predictions Update & Equity Outlook](#) · Nuveen Asset Management. Robert Doll will share his popular predictions for 2015, which he has called "the year of increasing belief," with an economic and investment outlook update that will include areas of opportunity and risk.

11:10 a.m. [Give a Gift to the Ones You Love - A Secure Financial Future](#) · Neuberger Berman. Creating a Family Love Letter can help you facilitate the necessary and sometimes sensitive conversations you must have about preserving, protecting, and transferring your legacy.

[Headwinds, Tailwinds & Opportunities in the Emerging Markets](#) · American Funds. Returns may have lagged the developed markets, but demographic and economic trends, together with attractive valuations, argue for selective long-term investment.

[Energy Update/Valuation Opportunities in MLP Investing](#) · New York Life/MainStay Investments. Crude oil has had a long and sustained decline in price that has created both winners and losers across the energy value chain. Learn about energy, energy infrastructure, and their futures.

12:05 p.m. [Lunch & 3rd Keynote: The Mental Game of Investing](#) · The Emotional Investor. Learn how our brain's hardwiring can sometimes trick our reasoning. Jay Mooreland will review several mind games and discuss how they influence our investment decisions.

1:30 p.m. [Opportunity Flows: Investing in Water-Related Companies](#) · Allianz Global Investors. Limits on supply and increasing demand are creating an ever-greater global water issue. This session will highlight the challenges and opportunities in global water investment.

[From Conflict to Clarity: Understanding Investor Sentiment](#) · Natixis Global Asset Management. This presentation will feature the results of the 2015 Global Survey of Individual Investors and focus on the pitfalls and opportunities of investing in Europe and Japan.

[The Active/Passive Debate](#) · Guggenheim Investments & Janus Capital Group. This debate-style presentation will explore the pros and cons of low cost, passively-managed index funds, which have generally outperformed actively-managed funds during the most recent six-year bull market.

2:30 p.m. [Wrap Up & Door Prize \(Including Two iPad Airs!\) Drawings](#)

3:15 p.m. [Cocktail & Hors d'oeuvres Reception](#)

[Click Here to RSVP](#)

Bring a Friend & You Both Attend for Free!

Admission is \$30 and may be paid in advance or at the door.

Please address checks to Carter Education Partners.

Investors should consider the investment objectives, risks, charges and expenses of mutual funds and ETFs, and variable annuities and their underlying funds carefully before investing. This and other important information about Mutual Funds and ETFs, and variable annuities are contained in the prospectus, which can be obtained from your financial adviser and should be read carefully before investing.

The opinions and services of the speakers and companies they represent are independent of Raymond James.

Investments in securities of MLPs involve risks that differ from an investment in common stock. MLPs are controlled by their general partners, which generally have conflicts of interest and limited fiduciary duties to the MLP, which may permit the general partner to favor its own interests over the MLPs.

International investing involves special risks, including currency fluctuations, differing financial accounting standards, and possible political and economic volatility. Dividends are not guaranteed and must be authorized by the company's board of directors.

Be advised that investments in real estate and in REITs have various risks, including possible lack of liquidity and devaluation based on adverse economic and regulatory changes. Additionally, investments in REITs will fluctuate with the value of the underlying properties, and the price at redemption may be more or less than the original price paid.

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. CFM is an independent firm.