REDHAWK UNIVERSITY

Sheraton Grand Nashville Downtown

REDHAWK® WEALTH ADVISORS

Redhawk University 2025 Agenda

Meeting Attire: Casual.

9/24: Wednesday

- 6:30pm – 7:30pm: Redhawk Executive Committee Meeting – **Studio 3**/Sheraton Grand Nashville Downtown.
- 7:30pm – 9:00pm: Reception – **Legislative Terrace/**Sheraton Grand Nashville Downtown. Appetizers and cocktails.

9/25: Thursday

- 7:30am – 8:00am: **Studio 4 Foyer** – Morning Essentials breakfast buffet. **Come dressed for golf and bring your clubs.**
- 8:00am – 8:15am: **Studio 4**, *Welcome.* **Dan Hunt**, CEO, Redhawk Wealth Advisors, Inc.
- 8:15am – 8:45am: *Income Outlook and Opportunity.* **Paul McGinn**, SVP, Client Portfolio Manager, Fixed-Income Strategy, First Trust.
- 8:45am – 9:15am: *Equity Markets Insight with Capital Group.* **Scott Hoyer**, Relationship Manager, Capital Group/American Funds.
- 9:15am – 9:45am: *Private Credit and Private Real Estate*. **Sean Morris**, Executive Director, PGIM Private Alternatives.
- 9:45am – 10:00am: **Break**
- 10:00am – 10:30am: *Creating a Referral Culture.* **Kevin Chalk**, Senior Business Management Consultant, Charles Schwab Advisor Services.
- 10:30am – 11:00am: *Moat Investing.* **Andrew Lane,** Director of Equity Research – Index Strategies, VanEck.
- 11:00am – 11:30am: *AI, Electricity and Energy: The Secular Trend for the Next Generation.* **Paul Baiocchi**, CFA, Chief ETF Strategist, SS&C ALPS.
- 11:30am – 12:00pm: *Tax-Managed Solutions: GS TACS Direct Indexing and Equity Premium Income ETFs.* **David Gonzalez,** Vice President/Regional Director and **Elizabeth Wyman**, ETF Specialist, Goldman Sachs Asset Management.
- 12:00pm: **Box lunch to go.**
- 12:15pm: **Golf** (1:30pm tee time). Gaylord Springs Golf Links. The bus leaves at 12:15pm. The bus will pick up at the course at 6:00pm and drive back to the Sheraton Grand Nashville Downtown. *18 Springhouse Lane, Nashville, TN 37214. (615) 458-1730*

  Hole-in-One Contest sponsored by Fidelity Investments: **Kelsea Sullivan,** Fidelity Regional Director.

- 3:30pm – 5:00pm: **Tennessee Whisky Workshop Experience.**
  407 Gallatin Ave, 407, Gallatin Ave, Nashville, TN.

- 8:30pm – 10:30pm: **Jeff Ruby's Steakhouse**.
  300 4th Avenue North in Nashville, TN. (615) 434-4300

9/26: Friday

- 8:00am – 8:30am: **Studio 4 Foyer** – Southern Start breakfast buffet. **Come dressed for Go Kart racing!** You must bring a valid driver's license. Wear comfortable clothing and closed-toed shoes are required.

- 8:00am: **Studio 4**
- 8:00am – 8:15am: *Golf awards.* **Dan Hunt**, CEO, Redhawk Wealth Advisors, Inc.
- 8:15am – 8:45am: *How to Position Fixed Income Today.* **Ronit Walny**, CFA, Head of Fixed Income Client Portfolio Management, Global Fixed Income, Northern Trust.
- 8:45am – 9:15am: *The Anatomy of a Recession- Quarterly Flipbook.* **Tom Antonovich**, Vice President, RIA Director, Franklin Templeton.
- 9:15am – 9:45am: *What's Driving the Boom in Options-Based ETFs?* **Matt Kaufman**, SVP, Head of ETFs, Calamos Investments.
- 9:45am – 10:00am: **Break.**
- 10:00am – 10:30am: *Orion 2025 Development Roadmap and Product Updates.* **Andy Larson**, Relationship Manager, Orion.
- 10:30am – 11:00am: *Ahead of the Curve | PIMCO Macro Views and Bond Market Implications.* **Todd Mangas**, Vice President & External Advisor Consultant and **Mark Shaw**, Vice President & ETF Account Manager, PIMCO Investments.
- PIMCO.
- 11:00am – 11:30am: *Are You Getting "Value" from Your Value Exposure*. **Gary Goska**, Regional Sales Director, Victory Capital Management.
- 11:30am – 12:00pm: *Fixed Income Outlook.* **Dan Larkin**, Senior Investment Director, Active Fixed Income Investment Management Group, Vanguard.
- 12:00pm: **Box lunch to go.**

- 2:00pm **– K1 Go Kart Grand Prix:** practice, qualifying, and finals. The bus leaves at 1:00pm and the racing starts at 2:00pm. The bus will pick up at K1 at 4:30pm and drive back to the Sheraton Grand Nashville Downtown. You must bring a valid driver's license. Wear comfortable clothing and closed-toed shoes are required.
  404 Davidson ST., Nashville, TN 37213. (615) 242-3275

- 5:30pm – 7:30pm: **Puckett's Restaurant:** A sought-after destination for live music, down-home cooking and the quintessential Southern experience!
  500 Church St. Nashville, TN 37219. (615) 770-2772

- 7:30pm – 9:00pm: **Party Bus with Bartender and DJ:** The bus will pick us up at Puckett's Restaurant and drop us off at the Sheraton Grand Nashville Downtown.

9/27: Saturday

- Depart

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Speakers

Tom Antonovich joined Franklin Templeton in 2017. As a trusted business partner, he brings valuable perspective to financial advisors in the areas of practice management, asset allocation and portfolio construction. Tom is a resource for all of Franklin Templeton's investment solutions, including mutual funds, separately managed accounts, 529 plans, ETFs, alternative investments and insurance products. Tom earned a Bachelor's degree in Finance from Iowa State University. He holds FINRA Series 7 and 63 licenses and has the Certified Investment Management Analyst (CIMA®), Chartered Alternative Investment Analyst (CAIA®), and Certified Financial Planner (CFP®) designations.

Wholesaler: **Tom Antonovich**, tom.antonovich@franklintempleton.com, (952) 221-8874.

Paul Baiocchi is the Chief ETF Strategist at SS&C ALPS Advisors, spearheading the firm's distribution strategy and execution for the ETF suite as well as the Select Sector SPDRs lineup of ETFs. Paul works closely with the distribution and research teams to tailor the firm's messaging and client facing content for the varied needs of a range of investor types. He is a CFA Charterholder, holds an MBA from the University of British Columbia's Sauder School of Business and a BS in Business Administration from California State University at Chico.

Wholesaler: **Ben Kirscht**, ben.kirscht@sscinc.com, (303) 619-3758.

Kevin Chalk has been serving the RIA Industry with Schwab Advisor Services for over 22 years. He has held roles as a Relationship Manager, where he focused on working directly with advisors and most recently began working with Schwab's Business Consulting team. Kevin received his undergraduate degree in Finance from East Carolina University in 1995, he completed his MBA in 2017 from Kennesaw State University and in 2021, obtained his Doctor of Business Administration degree from Georgia State University. Kevin also holds the Chartered Financial Analyst designation.

Relationship Manager: **Mark Pedersen**, mark.pedersen@schwab.com, (763) 443-7146.

David Gonzalez is a Vice President and Regional Director within Goldman Sachs Asset Management. In this role, he manages distribution partner relationships with the largest registered investment advisors and multi-family offices in the Midwest. David also served as a member of a $4 billion wealth management team working with ultra-high net worth families in the Chicago Private Wealth Management group. David earned a BS in Economics from Amherst College, and an MBA from the UCLA Anderson School of Management.

Wholesaler: **David Gonzalez**, david.gonzalez@gs.com, (312) 659-8814.

Gary Goska is a Regional Sales Director with Victory Capital Management. He joined Victory Capital in 2015 following 10 years' previous investment experience. Prior to his tenure with Victory, he was with Russell Investments and Strong Investments. Gary holds a Bachelor of Science in Finance from the University of Wisconsin-Whitewater. He is Series 7 and 63 licensed and holds the CIMA® designation.

Wholesaler: **Gary Goska**, ggoska@vcm.com, (414) 238-3956.

Scott W. Hoyer is an RIA relationship manager at Capital Group, home of American Funds. He has 18 years of industry experience and has been with Capital Group for 16 years. Prior to joining Capital, Scott worked as a retirement plan sales consultant at OneAmerica. He holds an MBA from the University of Indianapolis and a bachelor's degree in English from Wabash College. He also holds the Certified Investment Management Analyst® designation. Scott is based in Minneapolis.

Wholesaler: **Scott Hoyer**, scott.hoyer@capgroup.com, (317) 443-6253.

Matt Kaufman serves as SVP, Head of ETFs at Calamos Investments, where he leads the firm's ETF business. Matt joined Calamos Investments in 2023 as an accomplished financial services executive with more than 20 years of experience serving the asset management and insurance industries across North America, Europe, and Asia. Matt has designed, led, and helped build hundreds of exchange-traded funds (ETFs), unit investment trusts (UITs), indexes, variable insurance trust funds, registered index-linked annuities, fixed annuities, and closed-end funds. Matt earned a B.A. in Public Administration and Economics from Cedarville University and holds FINRA Series 7, 63, and 24 and CFTC Series 3 licenses.

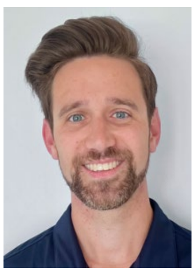
Wholesaler: **Matt Eastman**, meastman@calamos.com, (312) 718-2657.

Andrew Lane is the director of equity research, index strategies for Morningstar Research Services LLC, a wholly owned subsidiary of Morningstar, Inc. In this role, he focuses on design and marketing efforts for indexes that leverage data points produced by the Morningstar equity research team. Before joining Morningstar in 2013, Lane earned a Master of Business Administration, with a specialization in applied security analysis, from the University of Wisconsin-Madison. Prior to business school, he spent three years at Harris Associates LP, working in the trading operations group. Lane also holds a bachelor's degree from Boston College, having majored in economics and history.

Wholesaler: **Brad Pope**, bpope@vaneck.com, (312) 465-8098.

Dan Larkin joined **Vanguard** in 2016 as a senior product manager in Vanguard Portfolio Review Department, where he is responsible for supporting the active taxable fixed income product lineup, including: monitoring each fund's positioning and performance in the markets, communicating about our products internally and externally, and driving and implementing product improvements. Mr. Larkin earned a B.B.A. in finance at James Madison University.

Wholesaler: **Keenan Graham**, keenan_graham@vanguard.com, (952)-292-4478.



Andy Larson is a Relationship Manager at Orion Advisor Technology, a wealth tech powerhouse delivering an integrated suite of fully connected, disruptive technology and investment solutions on an open architecture platform. In his role, Andy works with firms to help them capture their goals, increase operational efficiencies, and leverage underutilized Orion technology. He is dedicated to guiding his clients toward best practices and ensuring they maximize their Orion experience, while keeping them informed on the latest tech updates and enhancements.

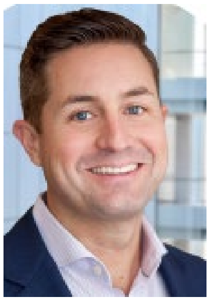
Relationship Manager: **Andy Larson**, andy.larson@orion.com, (402) 949-7267.

Todd Mangis is a vice president in the New York office and an external advisor consultant for Minnesota. Prior to joining PIMCO in 2011, he was a vice president in the wealth management group at Merrill Lynch, working with the firm's financial advisors in the heartland region of the U.S. He was previously a vice president with Neuberger Berman, helping to build the company's business in the plains states. Mr. Mangis has also held positions at Dreyfus Investments, Gartmore, and Deutsche Bank. Todd is a CFA and has 32 years of investment and financial services experience and holds a bachelor's degree from California State University, Long Beach. He is on the Board of Directors for the Minnesota Society of Analysts.

Wholesaler: **Todd Mangis**, todd.mangis@pimco.com.

Paul McGinn is a Senior Vice President and Fixed-Income Client Portfolio Manager. In this role, he serves as the Product Specialist representing the suite of actively-managed fixed-income ETFs and model portfolios. First Trust is the largest provider of actively-managed ETFs based on assets under management and number of funds offered. Paul's primary area of focus is to deliver the First Trust suite of fixed-income solutions to Financial Professionals across the spectrum including RIAs, Trust Departments, Pensions, Foundations and Endowments. Paul holds a Bachelor of Science degree in Political Science and Human and Organizational Development from Vanderbilt University.

Wholesaler: **Eric Stoiber**, estoiber@ftadvisors.com, (630) 915-6869.



Sean Morris is an executive director at **PGIM Private Alternatives** and a member of the U.S. Business Development team, focusing on private wealth solutions. Based in Boston, Sean partners with the global head of Wealth Strategies and PGIM Investments' product development, National Accounts and Distribution teams to help provide access across the PGIM Private Alternatives platform to individual investors via their intermediaries and advisors. Sean has a bachelor's degree in management from Villanova University and holds FINRA Series 7, 63 and 24 licenses.

Wholesaler: **Gary Stapp**, gary.stapp@pgim.com, (973) 289-6274.

Mark Shaw is a vice president based in Chicago and an ETF account manager on the U.S. global wealth management team. He focuses on ETF business development and managing client relationships in the U.S. Midwest. Prior to joining PIMCO in 2019, he was a director at Pacer Financial and a regional vice president at Invesco PowerShares, responsible for the distribution of ETFs across various wealth management channels. He has 13 years of investment and financial services experience and holds a bachelor's degree from the Krannert School of Management at Purdue University. He is a Chartered Alternative Investment Analyst (CAIA).

Wholesaler: **Todd Mangis**, todd.mangis@pimco.com.

Ronit Walny, CFA is the Head of Fixed Income Client Portfolio Management for **Northern Trust Asset Management (NTAM)**. She is responsible for connecting NTAM's fixed income solutions to clients across market segments. Ronit has over two decades of portfolio management, product development, and market making experience spanning the global fixed-income, inflation and commodity markets at firms including PIMCO, Neuberger Berman, Kellogg Capital, MacroMarkets and Northern Trust. Ronit holds a BBA in finance from Loyola University Chicago and is a CFA charterholder.

Wholesaler: **Bill Hurt**, bill_hurt@ntrs.com, (773)-851-2886.

Elizabeth Wyman is the Exchange Traded Fund (ETF) Specialist for the Midwest and Western regions within Goldman Sachs Asset Management's Third Party Distribution and Institutional businesses. Elizabeth joined Goldman in 2019. Prior to joining the firm, Elizabeth was an independent Financial advisor for over 7 years at National Securities and held several Operational and Sales roles at firms such as LPL Financial and Wells Fargo. She holds a B.A. in Business Management from San Diego State University..

Wholesaler: **David Gonzalez**, david.gonzalez@gs.com, (312) 659-8814.