



2019

**COHEN
CLIENT
CONFERENCE**

INVESTMENT INDUSTRY SERVICES

OCTOBER 16-18, 2019
Chicago, Illinois

Industry Crossroads
INNOVATE & ACCELERATE

Cohen & Co

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“A *differentiator* for Cohen.”

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“The Cohen Client Conference was
the perfect balance
between being informative through efficient
presentations and enjoyable through
well-orchestrated networking events.”

5 daily **HIGHLIGHTS**

“A very *classy* event!”

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“I’ve been to many conferences and this was on
the top of the list.
The location, facilities, dinners, etc. were all
excellent. The speakers were top notch as
were the facilitators. Very impressive and
great job communicating a message of being part
of the ‘Cohen family’ throughout the conference.”

7 additional **INFORMATION**

about the **CONFERENCE**

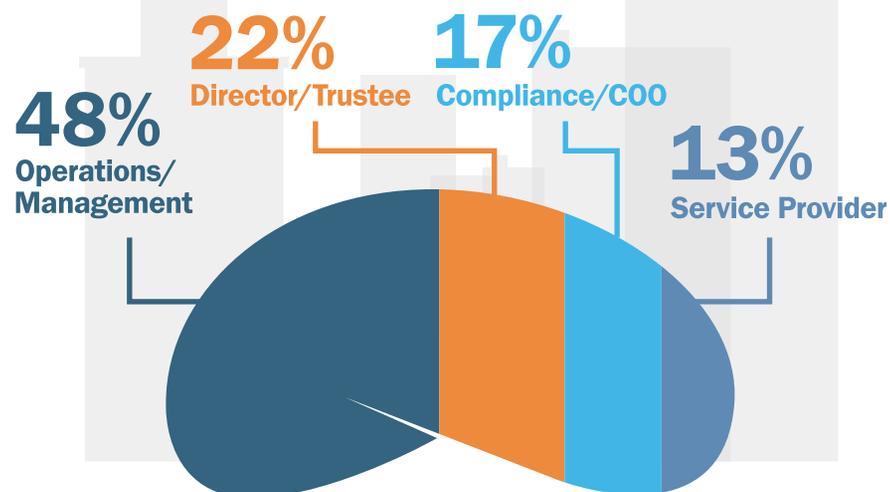
Since its inception in 2012, the **Cohen Client Conference** has become the centerpiece of our industry education initiatives focused on accounting, financial reporting and tax issues for our robust investment industry client base that includes:

- > Mutual Funds
- > Hedge Funds
- > Private Equity
- > Exchange Traded Funds
- > Commodity Pools
- > Investment Advisors
- > Fund Service Providers
- > High Net Worth Individuals
- > Collective Investment Trusts
- > Trusts and Foundations
- > MLPs, Cryptocurrency and Alternative Investments Funds

Using a two-day format, this exclusive, invitation-only educational and networking event offers a variety of content tailored to client interests as well as keynote speakers who were carefully selected for their compelling subject matter and engaging delivery style. Our 2018 conference was held in Baltimore and attracted over 350 attendees from 29 states and 4 countries.

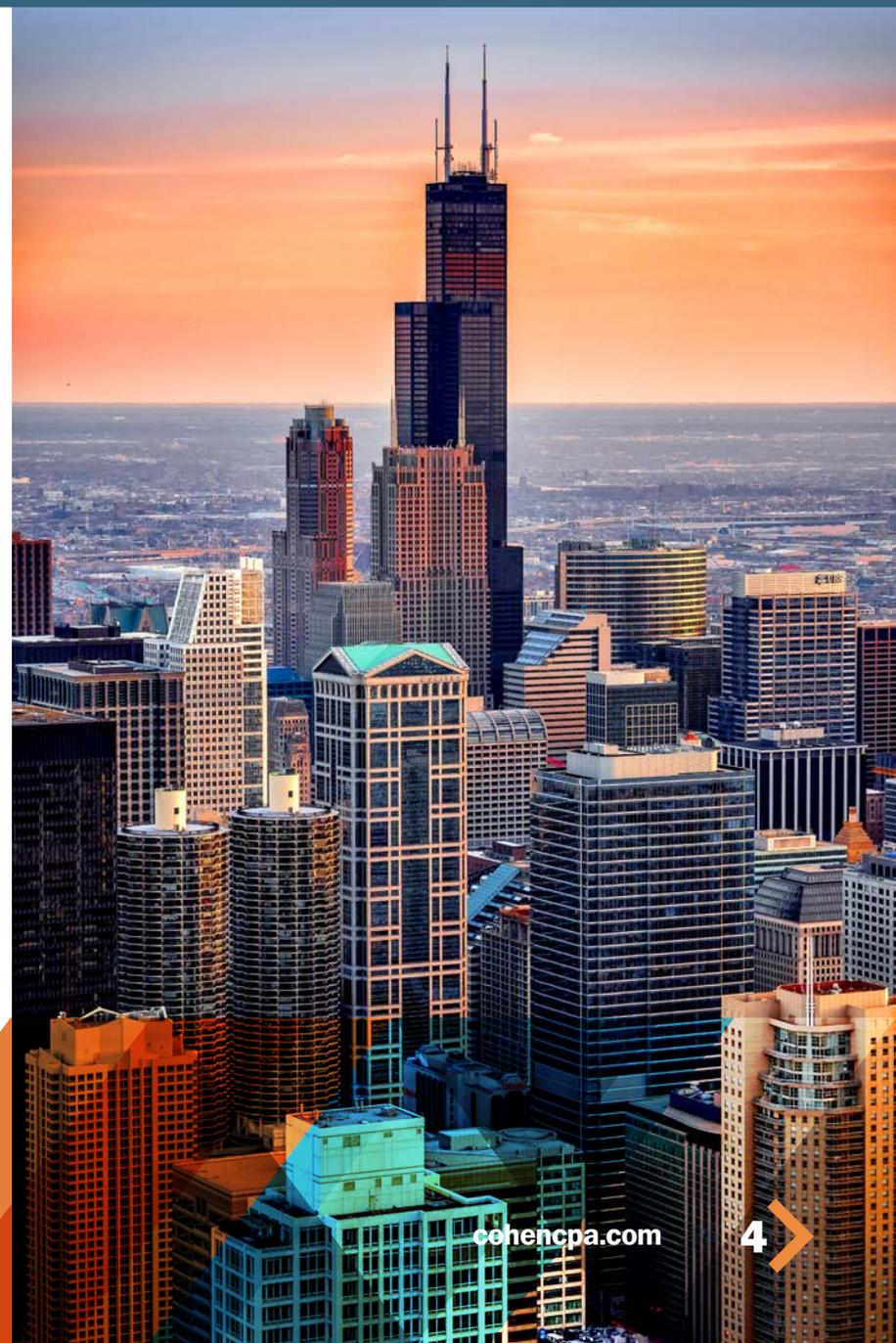
The 2019 Cohen Client Conference will be held in Chicago at the Westin Michigan Avenue, which is located on the bustling Magnificent Mile. Our conference will feature informative educational sessions and two social events where you can connect with industry colleagues and enjoy one of Chicago's most iconic steakhouse restaurants, Gibsons. Our goal is to provide an outstanding educational experience while offering opportunities to network and have fun!

CONFERENCE ATTENDEES



This year's conference features the following topics:

- Accounting and Auditing Update
- Communication and Leadership
- Entrepreneurial Innovation and Growth
- Director and Trustee Roundtable
- Disruptive Demographic Trends
- Introduction to Cryptocurrencies & Blockchain
- Lessons Learned from Tax Reform
- Litigation and Enforcement Update
- Private Equity Highlights
- Cryptocurrency Valuation Considerations
- Regulatory Intelligence for Commodities Professionals
- Sales and Distribution
- Tax Efficiency for Private and Public Funds
- Economic Update and Trends
- War Stories from the Trading Pit
- Compliance and Fund Operations Hot Topics



daily HIGHLIGHTS

Wednesday

If you arrive early, **stop by our office for a tour and cocktail** at the beautiful 151 N. Franklin building to learn more about our rapidly expanding presence in Chicago. The conference starts with an evening networking event at Chicago's **Flight Club**, featuring social darts with digital scoring, casual bites and a full bar. This time will allow you to meet with fellow industry leaders and stakeholders in a relaxed setting.

Thursday

Our first day of sessions kicks-off with a keynote by **Dr. James "Jim" H. Johnson, Jr.**, distinguished Professor of Strategy and Entrepreneurship and Director of the Urban Investment Strategies Center at the University of North Carolina, Kenan-Flagler Business School. Our keynote will examine the demographic changes, and their causes and consequences that are quickly becoming the realities of American society. From growing inequality and its social and economic effects, age and geographic shifts in wealth and population, inter-ethnic trends, and business demography and workforce diversity issues, Dr. Johnson's statistics-based approach will highlight what to expect in the communities and workplaces of the future. Asset managers take note of how the demographic trends of today will disrupt the investment industry of tomorrow. The rest of the day includes **technical offerings** applicable to both public and private funds, and other interesting topics such as cryptocurrency trends and bringing your most authentic self to work. Keynote speaker **Betsy Ziegler** from Chicago's 1871 will close our session. Then we head to a cocktail reception and dinner at **Gibsons**, an iconic Chicago steakhouse who celebrates 30 years in the Gold Coast this year.

Friday

We wrap up the conference with a half day of sessions including a keynote by **Anirban Basu**, Chairman & CEO of Sage Policy Group. Anirban's presentation, **To All the Economists I've Loved Before**, will discuss global, national, and regional economic performance, including aspects of economic life, such as the performance of corporate earnings, the implications of global monetary policy, and relative valuations of financial assets. Stay for the return of **War Stories from the Trading Pit** and our popular roundtable breakout sessions – great for diving deeper and gaining valuable insights from industry peers.

FEATURED SPEAKERS



Anirban Basu
Chairman & CEO
Sage Policy Group, Inc.



Dr. James H. Johnson, Jr.
Professor of Strategy
and Entrepreneurship;
Director, Urban Investment
Strategies Center
University of North Carolina



Craig Lucas
Founder
Authentica



Betsy Ziegler
CEO
1871, Chicago's Technology
& Entrepreneurship Center

Schedule

Wednesday, October 16

- 3:00 PM Registration Opens
- 5:00 PM – 6:30 PM Chicago Office Welcome Event *(optional)*
- 6:30 PM – 10:00 PM Flight Club Darts - Social Event

Thursday, October 17

- 9:00 AM – 9:15 AM Welcome & Introduction
- 9:15 AM – 10:45 AM** **Keynote Speaker:**
Dr. James “Jim” H. Johnson, Jr.
- 11:00 AM – 12:00 PM Concurrent Sessions #1
- 12:00 PM – 1:15 PM Networking Lunch
- 1:15 PM – 2:15 PM Concurrent Sessions #2
- 2:30 PM – 3:30 PM Concurrent Sessions #3
- 3:45 PM – 4:45 PM** **Keynote Speaker: Betsy Ziegler**
- 5:00 PM – 9:00 PM Gibsons Bar & Steakhouse -
Cocktails & Dinner

Friday, October 18

- 8:45 AM – 9:45 AM Featured Session
- 9:45 AM – 10:45 AM** **Keynote Speaker: Anirban Basu**
- 11:00 AM – 12:00 PM Concurrent Sessions #4
- 12:00 PM – 1:00 PM Networking Lunch *(optional)*
- 12:00 PM – 3:00 PM Chicago Office Welcome Event *(optional)*

Events & Networking



Flight Club is Chicago's home of Social Darts! With ground breaking dart-tracking technology, Social Darts allows all levels of players to participate and easily track their progress.

Gibsons Bar & Steakhouse has been a Chicago icon since opening its doors in May of 1989. The classic American steakhouse is the first in the country to be awarded its own USDA Prime Beef Certification.



additional INFORMATION



Travel & Accommodations

Our conference will take place at the dazzling, downtown **Westin Michigan Avenue** located on the Magnificent Mile in the heart of the Gold Coast. Situated close to many of the city's popular attractions you can easily explore Millennium Park, shop at luxury boutiques or visit historic museums before or after the conference. Chicago is also home to two first-class international airports, O'Hare and Midway, with thousands of inbound flights from more than 270 destinations daily.

Why We Chose Chicago

With a truly unique mix of global attractions and local charm, Chicago has it all — a large financial district, beautiful architecture, amazing food, a great nightlife. It is also home to our newest Cohen & Company office! Our second home in the Second City is located in downtown's 151 North Franklin building. At 4,700 square-feet, our new space can support the incredible growth we have experienced in our team and services (expanding to include investment industry, management consulting and transaction advisory services) since opening our doors in 2018.



contact **INFORMATION**

This is an invitation only event and registration will open mid-summer.
If you would like more information please contact **Kate Duborg** at
kduborg@cohen CPA.com or (414) 203-6330.



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