

November 12-13, 2024

**LOCATION:** OPPENHEIMER & CO. INC.  
 85 BROAD STREET 22<sup>ND</sup> FLOOR  
 NEW YORK, NY 10004

**TUESDAY, NOVEMBER 12, 2024**

|         |   |   |
|---------|---|---|
| 10:45am | Welcome   | Daniel Mullen<br>Executive Director, OAM                            |
| 10:50   | The Power of Oppenheimer Thinking                         | Joan Khoury<br>CMO, Oppenheimer & Co. Inc.                          |
| 11:05   | Discover Tax Efficiency at Oppenheimer                    | Meghan Ramirez<br>Managing Director, OAM                            |
| 11:20   | Inside the 2024 Election                                  | Bill Bird<br>Director of Equity Research,<br>Oppenheimer & Co. Inc. |
| 11:35   | Where We Stand: Tax Exempt Fixed Income                   | Ozan Volkan<br>Managing Director, OIA                               |
| 11:50   | Lunch   |   |
| 12:00   | 1031 Exchange 101   | Joe Werner<br>JLL   |
| 12:50   | Tax Managed Solutions: Direct Indexing and Exchange Funds | Chris Webb<br>Eaton Vance   |
| 1:20    | Break – Picture Perfect: LinkedIn Photo Opportunities     |   |
| 1:30    | Become Uncommon   | Brian Gleason<br>Uncommon Elite                                     |
| 2:15    | The Referral Code   | Lisa Kueng<br>Invesco   |
| 2:45    | Break   |   |
| 3:00    | Anatomy of a Recession                                    | Corey Hardie<br>ClearBridge Investments                             |
| 3:30    | State of Accounting Referral Industry                     | Dr. Jay Nisberg   |
| 4:00    | Top Actionable Ideas: Peer Discussion                     |   |
| 4:45    | Closing Comments  |   |
| 6:00pm  | Cocktails and Dinner                                      |   |

**WEDNESDAY, NOVEMBER 13, 2024**

|        |  |                                 |
|--------|--|---------------------------------|
| 7:30am | Breakfast @ 85 Broad   | Oppenheimer Executive Committee |
| 9:00   | New York Stock Exchange Tour<br><i>Photo opportunities to follow</i> |                                 |
| 12:45  | Depart New York Stock Exchange                                       |                                 |