

OUTLOOK 2021

INCOME & VALUE IN CLOSED-END FUNDS

SUMMIT AGENDA

2021 Economic & Market Outlook

Brian Wesbury, Chief Economist with First Trust addresses the economy, investment markets and the impact of the November elections with his insights into where we are headed and how we should be positioned in 2021.

Brian Wesbury, Chief Economist — First Trust

Closed-End Fund Opportunities & Outlook

Closed-End fund experts Jonathan Isaac, Eaton Vance; Dave Lamb, Nuveen and Jeff Margolin, First Trust, discuss their perspectives on the closed-end fund market and where they see opportunities for investors in 2021.

Jonathan Isaac, Vice President, Director of Product Management – Eaton Vance

Dave Lamb, Vice President – Nuveen

Moderator: Jeff Margolin, Senior Vice President – First Trust

Global Real Estate: Finding Value in a Changing Market

David Leggette, CBRE, is joined by Joseph Smith, CBRE's Co-CIO of Listed Real Estate Strategies, to provide their insights on the global real estate market and potential opportunities in listed real estate particularly with the economic and market impact of COVID-19.

Joseph Smith, Co-CIO Listed Real Estate Strategies – CBRE Clarion Securities

Moderator: David Leggette, Head of Marketing - CBRE Clarion Securities

Convertible Bonds: Balance in Times of Volatility

Will Korver, Guggenheim, is joined by convertible bond expert Barry Nelson, Advent Capital, to discuss the potential for convertibles to provide equity-like returns with downside protection for periods of market volatility.

F. Barry Nelson, CFA®, Senior Advisor – Advent Capital Management LLC

Moderator: Will Korver, Director – Guggenheim Investments

Income Strategies with Infrastructure & Real Assets

Portfolio managers with Aberdeen Standard, Brookfield and Oaktree discuss market outlook and the income and return potential of Infrastructure, Real Estate and Real Assets for investors seeking differentiated strategies in a low rate environment.

Josh Duitz, Portfolio Manager-Global Equities – Aberdeen Standard Investments

Ryan Sullivan, Portfolio Manager/Co-Head of Real Assets – Aberdeen Standard Investments

Justin Guichard, Managing Director & Co-Portfolio Manager - Oaktree Capital

Moderator: Larry Antonatos, Managing Director – Brookfield

Tax Efficient Income in a Yield Starved World

Dave Lamb, Nuveen, is joined by municipal bond portfolio manager Steve Hlavin, Nuveen, to provide their insights on the municipal bond market and potential opportunities in tax-efficient income strategies.

Steve Hlavin, Portfolio Manager - Nuveen

Dave Lamb, Vice President – Nuveen

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