

CSM Macro Conference

Thursday, September 7th, 2017

The Pierre Hotel, New York – The Grand Ballroom

AGENDA

- 7:30 – 8:10 **Registration & Breakfast**
- 8:10 – 8:15 **Welcoming Remarks**
François Trahan, Cornerstone Macro, Chief Investment Strategist
- 8:15 – 9:15 **Steve Eisman**
Managing Director and Portfolio Manager, Eisman Group at Neuberger Berman Group LLC
- 9:15 – 10:05 **A Conversation with Douglas Holtz-Eakin**
President, American Action Forum; Former Director, Congressional Budget Office; Former Chief Economist, Council of Economic Advisers
Hosted by Andy Laperriere, Cornerstone Macro, Head of U.S. Policy
- 10:05 – 10:55 **The Rise and Fall of Nations...the Winners and Losers of the Post-Crisis World**
Ruchir Sharma
Chief Global Strategist & Head of Emerging Markets, Morgan Stanley Investment Mgmt; Author of *The Rise and Fall of Nations* and *Breakout Nations*
- 10:55 – 11:45 **Challenges Facing President Trump and their Implications for the 2018 Midterm Elections**
Charlie Cook, The Cook Political Report, Editor & Publisher
- 12:00 – 1:30 **Luncheon Presentation by Newt Gingrich**
Author and Politician from Georgia, 50th Speaker of the US House of Representatives
- 1:45 – 2:35 **Rolling the Calendar – A Look Ahead to 2018/2019**
Larry Robbins, CEO and Founder, Glenview Capital Management
- 2:35 – 3:25 **How Disordered is the World?**
Richard Armitage, President of Armitage International; Former Deputy Secretary of State
- 3:25 – 4:25 **A Conversation with Stan Druckenmiller**
Chairman, CEO and Founder Duquesne Family Office LLC
Hosted by François Trahan, Cornerstone Macro, Chief Investment Strategist
- 4:25 – 4:30 **Closing Remarks**
Nancy Lazar, Cornerstone Macro, Chief Economist
- 4:30 – 6:00 **Cocktail Reception**

WiFi: Cornerstone
Password: welcome2017