



16th Annual Capital Link Closed-End Funds and Global ETFs Forum

Thursday, April 27, 2017
The Metropolitan Club, One East 60th St., New York City

In Cooperation With



Join us at Capital Link's
16th Annual Closed-End Funds and
Global ETFs Forum on
Thursday, April 27, 2017 in NYC.

BRONZE SPONSOR



David Sachs, Partner at Ares Management will
be speaking on:

Are CEFs a Value Proposition Today?
8:00AM – 8:40AM

Moderator: Mariana Bush, CFA, Senior Analyst – Wells Fargo
Advisors

Panelists:

- **Robert F. Bush, Jr.**, Senior Vice President – Calamos Investments
- **David Sachs**, Partner – Ares Management
- **Jim Robinson**, Senior Portfolio Manager – Robinson Capital
- **John Bartlett**, Vice President, Portfolio Manager, Electric & Gas Utility Research – Reaves Asset Management

[Register Now](#). This event requires pre-registration
so reserve your seat today.
Space is limited.

FORUM DETAILS

Thursday, April 27, 2017
8:00 AM – 5:00 PM

Location:
[The Metropolitan Club](#)

[REGISTER](#)

[AGENDA](#)

FEATURING



David Sachs
Partner
Ares Management

About the Forum

With a 16-year track record, **Capital Link's Annual Closed-End Funds & Global ETFs Forum** is the longest running investment forum with significant branding and recognition in the industry. It updates the broader investment community on the latest trends, developments and investment strategies using Closed-End Funds, MLPs, BDCs, and Exchange Traded Funds.



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Press Release

FOR IMMEDIATE RELEASE

April 4, 2017

CAPITAL LINK'S 16TH ANNUAL CLOSED-END FUNDS & GLOBAL ETFS FORUM THURSDAY, APRIL 27, 2017 –THE METROPOLITAN CLUB, NEW YORK CITY

NEW YORK, NY, April 4, 2017 - Capital Link's 16th Annual Closed-Ends Funds & Global ETFs Forum will take place on **Thursday, April 27, 2017** at the **Metropolitan Club** in **New York City**.

This event is held in cooperation with the New York Stock Exchange.

Financial Advisors and Qualified Investors can attend the morning and afternoon sessions at no cost. The Forum has been submitted for 8 CFP/CIMA/CPWA CE Credits.

REGISTRATION

To register please click on the link below or copy and paste it in your browser:

<http://forums.capitallink.com/cef/2017/index.html>.

FORUM OVERVIEW

With a 16-year track record, Capital Link's Annual Closed-End Funds & Global ETFs Forum is the longest running investment forum with significant branding and recognition in the industry. It updates the broader investment community on the latest trends, developments and investment strategies using Closed-End Funds, MLPs, BDCs, and Exchange Traded Funds.

This conference consistently draws over 1,000 investment professionals every year. Financial advisors, institutional investors, RIAs, private bankers, financial planners, fund and asset managers, analysts, and financial media utilize this Forum not only as a resource for sharing and evaluating the latest CEF and ETF products and trends, but also as an interactive platform for enhancing visibility and establishing the right connections.

There are six **INDUSTRY PANELS**: Are CEFs a Value Proposition Today; Are Term Trusts the Wave of the Future or a Passing Fad; The Use of Leverage in CEFs; BDCs – Financing America's Growth; MLP Industry Roundtable; and ETF Industry Roundtable.

PRESENTATION ON INVESTMENT STRATEGIES include: Closed-End Funds: Access vs. Alpha; Actively-Managed ETF of Closed-End Funds; Commodities Investing; Healthcare Investing in a Closed-End Fund Format; International Investing; Generate Dividends through Global Equity Income Investing; Alternative Income Institute - REITs, MLPs, Preferred Securities and Closed-End Funds; Optimizing Advisor Access to Alternative Investment Opportunities; and Uncovering Value in the BDC Industry.

FORUM TARGET AUDIENCE

Financial advisors, institutional investors, registered investment advisors, private bankers & wealth managers, securities analysts, retail & institutional brokers, industry specialists & analysts, financial press & media, and other

qualified investors will be in attendance.

EVENT ADVISORY BOARD MEMBERS - *Distinguished industry analysts*

- Mariana Bush, CFA, *Senior Analyst* – Wells Fargo Advisors
- Michael Jabara, *Executive Director, Head of ETF & CEF Research* – Morgan Stanley Wealth Management
- Elias Lanik, *Senior Closed-End Fund Analyst* – BofA Merrill Lynch Global Research
- Alexander Reiss, *Director* - Stifel

PARTICIPATING COMPANIES:

- Aberdeen Asset Management (NYSE:FAX, IFN, ISL, JEQ, GCH, LAQ)
- Alpine Funds (NYSE:AOD, AGD)
- Ares Management LLC (NYSE:ARDC) CADEX (A share)
- BlackRock
- BofA Merrill Lynch Global Research
- Calamos Investments
- Cohen & Steers (NYSE:UTF, RFI, RQI, RNP, MIE, PSF, LDP, FOF)
- Deutsche Asset Management (NYSE:CEE, EEA, GF)
- ETF Securities (NYSEArca:BCI, BCD)
- First Trust Portfolios (NASDAQ:FCEF, MCEF); (NYSE: FDEU, FEL,, FPF)
- Fitch Ratings
- Goldman Sachs Asset Management
- Infrastructure Capital Advisors
- Mercury Capital Advisors
- Morgan Stanley Wealth Management
- Prospect Capital Corporation (NASDAQ:PSEC)
- Reaves Asset Management
- Robinson Capital
- Saba Capital Management, LP (BATS:CEFS)
- Stifel
- Tekla Capital Management LLC (NYSE:HQH, HQL, THQ, THW)
- Tortoise Capital Advisors (NYSE:TYG, NDP, NTG, TPZ, TTP)
- Wells Fargo Securities

FORUM SPONSORS & MEDIA PARTERS

IN COOPERATION WITH: New York Stock Exchange

SILVER SPONSORS: Calamos Investments • Cohen & Steers • First Trust Advisors

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MEDIA PARTNERS: Barclay Hedge • Barron's • ETFdb.com • Hedge Fund Alert • Investor's Business Daily • Seeking Alpha

UPCOMING RELATED EVENTS

The **4th Annual Dissect ETFs Forum** will take place on **Thursday, June 22, 2017** at **The Metropolitan Club** in **New York City**.

For the complete 2017 Events Calendar, please visit: forums.capitallink.com

FOR MORE INFORMATION AND TO REGISTER:

Please visit: <http://forums.capitallink.com/cef/2017/index.html>

Or, contact Nicolas Bornozis at Forum@CapitalLink.com.

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ORGANIZER: CAPITAL LINK, INC.

Founded in 1995, Capital Link is a New York based investor relations, financial communication and advisory firm with strategic focus on Closed-End Funds and ETFs, MLPs, the energy, commodities and maritime sectors. In addition, Capital Link organizes ten investment conferences a year in the United States and Europe all of which are known for combining rich educational and informational content with unique marketing and networking opportunities. Capital Link is a member of the Baltic Exchange. Based in New York City, Capital Link has offices in London, Athens & Oslo.