

2012 FINANCIAL ADVISOR WEBINAR SERIES

Real Asset Exposure: Diversification Beyond the Traditional

Thursday, June 21, 2012 at 2:00 p.m. (EDT)

SPEAKERS



Jodie Gunzberg [moderator]

*Director, Commodity Indices
S&P Indices*

Jodie M. Gunzberg is director, commodity indices, at S&P Indices. Jodie is responsible for the product management of the S&P Commodity Indices, which includes the S&P GSCI®, widely regarded as the leading measure of general commodity price movements and inflation in the world economy. In addition, Jodie writes index methodologies, educational material and market commentary.

Prior to joining S&P Indices, Jodie held various roles within the consulting and the investment management business. She managed portfolios in various asset classes including real estate, fixed income, equities, and hedge funds. Most recently, Jodie was the chief investment strategist for an investment consulting firm overseeing over 350 plans ranging in size from US\$ 10 million to US\$ 13 billion, totaling more than US\$ 85 billion in assets. Jodie has published many industry pieces on hedge funds and commodity investing, and is a frequent panel speaker and moderator.

Jodie is a CFA charter holder, member of the CFA Institute and serves as a director on the Board of Directors for CFA Chicago. She received her M.B.A. from the University of Chicago, Booth School of Business, and earned a B.S. in Mathematics from Emory University.



Wayne G. LeSage, Jr., CFA

*Director, Investments & Strategic Accounts
DundeeWealth US, LP*

Wayne LeSage is Director, Investments & Strategic Accounts with DundeeWealth US, LP. Prior to joining DundeeWealth US in 2007, Wayne held the positions of Investment Officer (2006-2007) and Investment Associate (2004 - 2006) at Davidson Capital Management. He was an Assistant Portfolio Manager with Valley Forge Asset Management Corporation from 2002 - 2004, and a Financial Analyst with White & Case, LLP from 2001 - 2002. Wayne is a CFA Charterholder and earned an MBA in Finance from The Wharton School and a BBA in Finance from the University of Notre Dame.



John Lunt

President

Lunt Capital Management, Inc.

John is the founder and President of Lunt Capital Management, Inc., a money management firm with expertise in specialty diversification, tactical management strategies, and exchange traded funds. John has been a featured speaker at conferences across the country, and has written extensively about financial markets. He graduated with honors from Brigham Young University with a degree in Economics, and later received an MBA in Finance and International Business from New York University. Since 2001, he has served on the board of Utah Retirement Systems, a multi-billion dollar pension fund. From 2004 to 2007 he was elected by his peers as board president. Institutional Investor's 7th Annual Hedge Fund Industry Awards in June of 2009 recognized Utah Retirement Systems as the Public Pension Fund of the Year. He has also completed the Program for Advanced Trustee Studies at Harvard Law School. John completed a number of courses at the New York Institute of Finance on trading and portfolio management and formerly worked on the Washington, D.C. staff of U.S. Senator Robert Bennett.



Lucas Turton, CFA

Managing Partner & Chief Investment Strategist

Windham Capital Management

LUCAS TURTON, CFA is a Managing Partner and the Chief Investment Strategist of Windham Capital Management, LLC. Lucas joined Windham in 2004 and is responsible for the development and management of Windham's investment solutions for high-net worth individuals, family offices, financial advisors and select institutions. Prior to business school, Lucas spent five years with United Technologies Corporation where he was an engineer focused on the development and application of customized technology solutions.

Lucas received a Bachelor of Science degree from Cornell University and a Master of Business Administration degree from the Massachusetts Institute of Technology. Lucas is a member of the CFA Institute and the Boston Security Analysts Society.