AIM 20 Year Reunion
Schedule of Events

Thursday, June 11, 2015

6:00  Opening BBQ
Tent North of Main Circle on South Quad (families welcome)

Friday, June 12, 2015

7:15  Registration & Continental Breakfast

8:00  Welcome
McKenna Hall Auditorium
Scott Malpass
Vice President and Chief Investment Officer, University of Notre Dame

8:15  University of Notre Dame Update
Dr. John Affleck-Graves
Executive Vice President, University of Notre Dame

9:00  Around the World in 60 Minutes: Key Themes in the Geopolitical Landscape
George Friedman
Chairman, Stratfor Global Intelligence

10:15  Networking Break

10:45  AIMx Notre Dame: The Future of American Energy
Sean Klimczak (AIM 5)
Managing Director, Blackstone

11:05  AIM for Alpha: Diamond in the Rough – The Best Long Value Play
Damian Giangiacomo (AIM 5)
Managing Partner, Nexus Capital Management

11:25  AIMx Notre Dame: Credit Market Opportunities – What’s Next
John Reilly (AIM 5)
Founder, South Ferry Capital Management

12:00  Lunch
Morris Inn
Featured Speaker: Frank Reilly  
Professor Emeritus, Bernard J. Hank Professor of Finance

2:00  The Notre Dame Endowment: Investing in the Current Environment  
_McKenna Hall Auditorium_  
Scott Malpass

2:50  AIM for Alpha: The Short of the Century  
Mat Klody (AIM 5)  
Partner, MCN Capital

3:10  AIMx Notre Dame: The Next Disruption  
David George (AIM 21)  
Vice President, General Atlantic

3:30  Networking Break

4:00  AIM for Alpha: The Best Buy I Can Find  
Susan Fanning (AIM 13)  
Equity Analyst, Perkins Investment Management

4:20  A New Step Forward: The Notre Dame Institute for Global Investing  
Jim Parsons (AIM 1), Scott Malpass, and Professor Shane Corwin

5:00  Break

Optional Session: Finding Your Way to Business School  
Panel discussion on the application process as well as benefits of an MBA

6:30  Cocktail Hour  
_South Dining Hall (spouses welcome)_

7:30  Dinner  
_South Dining Hall (spouses welcome)_  
Keynote Address from Kevin Plank  
Chief Executive Officer, Under Armour

9:30  After Dinner Gathering & Drinks  
_Tent North of Main Circle on South Quad (spouses welcome)_
Saturday, June 13, 2015

7:15  Asset Class Networking Breakfasts  
     *Morris Inn & McKenna Hall Auditorium*

8:30  Leadership  
     *McKenna Hall Auditorium*  
     SEAL Team Leader (Ret.) Robert O’Neill

9:45  Networking Break

10:00  BIA Training Session  
     *McKenna Hall Auditorium*  
     Former CIA Agents teach you how to ask the right questions and get to the truth

11:30  Lunch  
     Box lunches available before afternoon activities

12:30  Afternoon Activities  
     *Athletics Facilities Tour – Notre Dame Stadium*  
     *Beer & Wine Tasting – Sorin’s/Rohr’s in the Morris Inn*  
     *Family Friendly Activity – South Quad*  
     *Golf – The Warren Golf Course*  
     *Tennis Clinic – Courtney Tennis Center*

6:15  Mass  
     *Basilica of the Sacred Heart*  
     Rev. Sean McGraw, CSC

7:00  Cocktail Hour  
     *South Dining Hall (spouses welcome)*

8:00  Dinner  
     *South Dining Hall (spouses welcome)*  
     Keynote Address from Coach Brian Kelly  
     Head Coach, Notre Dame Football

10:00  After Dinner Gathering & Drinks  
     *Tent North of Main Circle on South Quad (spouses welcome)*