First Trust

You are cordially invited to the First Trust

ETF INSTITUTE

DATE/TIME

Thursday, January 13, 2022
11:15 a.m. - Arrivals
11:30 a.m. – 1:00 p.m.
Lunch & Presentations

LOCATION

The Post Oak Hotel
1600 West Loop South
Houston, TX 77027
Hosted Valet Parking

HOSTED BY

Joe Foley
Vice President
First Trust

Eric Holsen
Senior Vice President,
RIA/Institutional
First Trust

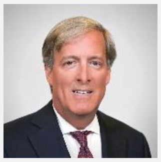
Please contact Jake Lindquist, Internal Wholesaler at 630-517-7612 or JLindquist@ftadvisors.com or Tim Ellingsen, RIA/Institutional Associate at 630-517-7655 or TEllingsen@ftadvisors.com with any questions.

FEATURED SPEAKERS

Dan Waldron
Senior Vice President, ETF Strategist

Dan will discuss the use of factors to identify and capitalize upon investment opportunities in the equity market and highlight ETFs that utilize this factor-based approach.

Receive 1 CFP CE credit hour. CFP number must be provided to receive proper credit. CE credit for the specific event is subject to change based on final agenda and speakers.



Paul McGinn
Senior Vice President, Client Portfolio Manager, Fixed-Income Strategy

The discussion as to interest rates and credit risk surely ensues uncertainty when it comes to fixed-income. Paul will discuss current market events and debunk many of the myths that exist in the prevailing “narrative”. Additionally, he will focus heavily on the real implications for fixed-income markets with an in-depth look at the risks and potential opportunities.

Christopher Mortimer
Senior Vice President, Business Development, Cboe Vest Financial LLC

Christopher Mortimer serves as senior vice president of business development and has over a decade of experience in the financial services and asset management industry. He is the primary liaison between Cboe Vest's clients, prospective clients, and the distribution resources of the firm and its partners. Mr. Mortimer is also responsible for providing technical product support and generating marketing and sales-related content.

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