



# THE ECONOMY 2012: STRATEGIES IN AN UNCERTAIN GLOBAL ENVIRONMENT

## KEYNOTE SPEAKER



**James D. McCool '82**  
Executive Vice President  
Institutional Services  
The Charles Schwab  
Corporation

James D. McCool leads the Institutional Services business, serving independent investment advisors plus corporate clients and their employees.

Institutional Services provides custodial, operational and trading support for more than 6,000 independent investment advisory firms that serve 1.5 million individual clients. It also offers a spectrum of corporate retirement and brokerage services, either directly to corporations or through third party administrators. These services include employer-sponsored retirement plans, stock plans, and corporate brokerage services, in addition to recordkeeping, trustee and custodial services. McCool also oversees Schwab's investment-only sales and mutual fund clearing businesses. He is a member of Schwab's Operating Council.

A veteran of the financial services industry with extensive experience in the business-to-business model, McCool began his career in the retirement plan servicing industry in 1984 as one of the initial employees of The Hampton Company, which became a wholly owned subsidiary of The Charles Schwab Corporation in 1995. Most recently, he served as executive vice president of Corporate and Retirement Services. Prior to that, he was senior vice president and general manager of the Plan Administrator Services enterprise serving third party administrators and retirement advisors.

McCool is active in government affairs on issues of regulatory reform affecting defined contribution plans and has provided expert testimony on various issues involving the retirement plan industry. He is a frequent speaker before various industry groups as well as professional organizations in the investment, legal and actuarial professions. McCool was appointed to the ERISA Advisory Council in 2005 and served as chair in 2007. McCool has also served as a delegate for the 2002 National Summit on Retirement Savings and was chairman of the SPARK/ National Defined Contribution Council (NDCC) Institute Investment Advice Task Force, which was charged with developing educational materials for key members of U.S. Representative John A. Boehner's Education and the Workforce Committee.

McCool earned his Bachelor of Science degree in business administration from the University of Akron. He is a member of the American Society of Pension Professionals & Actuaries (ASPPA) and holds multiple securities licenses.

## PANELISTS



**Paul Christopher, CFA**  
Chief International  
Investment Strategist  
Wells Fargo Advisors

Paul Christopher is chief international investment strategist in ASG. He focuses on the international economic outlook and offers investment advice on currencies and commodities. Prior to joining Wells Fargo Advisors, he developed economic strategies to trade in global financial and commodity futures markets for Eclipse Capital Management. In previous positions, Paul supplied international economic perspectives for A.G. Edwards, and advised institutional clients of Istanbul-based Global Securities on the oil-based economies of the Caucasus and Central Asia. In addition, he consulted with the governments of Hong Kong, Egypt, Russia, Kazakhstan and the Kyrgyz Republic on monetary policy issues.

Paul serves on the firm's Investment Strategy Committee and is a Chartered Financial Analyst (CFA) charterholder. Paul has been frequently quoted in national media outlets such as *The Wall Street Journal*, *The New York Times*, *Forbes*, *Time*, *Investor's Business Daily*, *USA Today*, *Bloomberg News*, *ABC News*, *NBC News*, *CNBC* and *CNN*. He received his B.A. in Economics and Spanish from Saint Louis University and his M.A. in Economics from the University of Rochester.



**Lynn S. Hamilton**  
Senior Vice President  
Portfolio Manager  
Key Bank

Lynn S. Hamilton is a Senior Vice President and Portfolio Manager at Key Bank. He has been managing investments since 1977. In 1982 he joined Investment Management & Trust Services, a Key Bank affiliate. He has been there ever since, and now serves as a member of Key's National Strategy committee. Lynn received his Bachelor of Arts from the College of Wooster and his Masters of Business Administration from Miami University.

Lynn has been profiled in *Medical Economics*, *Kiplinger*, *American Banker* and *Barrons*. He has also appeared on *CNBC's "Your Portfolio"*. Along with being a member of the Cleveland Society of Security Analysts, Lynn is a Williamson Fellow, through Youngstown State Universities Williamson Graduate School of Business.

Active in the community, Lynn serves as a board member of many civic and cultural organizations, as well as educational institutions. He is a board member of the Rodney Klein Stock Market Library and Museum in Massillon, Ohio. His wife, Cheryl is a graduate of The University of Akron with a B.S. in mechanical engineering.

## MODERATOR



**Melinda Newman Ph.D.**  
Associate Professor  
The University of Akron  
Department of Finance

## CORPORATE SPONSORS



UNDERWRITERS  
Joanne Rohrer - Faculty/Student Support

# THE ECONOMY 2012: STRATEGIES IN AN UNCERTAIN GLOBAL ENVIRONMENT

Reservation Deadline:  
Thursday, March 15, 2012

Registration:  
<http://www.uakron.edu/cba/economy2012>

REGISTER  
TODAY!

SEATING  
IS  
LIMITED.

Please complete the form below and mail or fax it to:  
Katie Logsdon  
214 CBA  
The University of Akron  
Akron, OH 44325-4803  
(330) 972.5691 (phone)  
(330) 972.5970 (fax)  
[logsdon@uakron.edu](mailto:logsdon@uakron.edu)

## REGISTRATION

**FEES: \$30.00 per person**

**\$300.00 for Table Sponsor**  
(table of 8 persons, program recognition and table recognition)

**\$1000.00 for Corporate Sponsor**  
(table of 8 persons; logo recognition in marketing, signage and program; recognition on conference badges)

Registrant Name Professional Designation

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____

Organization \_\_\_\_\_  
Address \_\_\_\_\_  
City, St, Zip \_\_\_\_\_  
Phone \_\_\_\_\_  
E-Mail Address \_\_\_\_\_

Attendees: \_\_\_\_\_ @ \$30 Total: \_\_\_\_\_  
Tables Sponsor: \_\_\_\_\_ @ \$300 Total: \_\_\_\_\_  
Corporate Sponsor: \_\_\_\_\_ @ \$1000 Total: \_\_\_\_\_

TOTAL REGISTRATION FEES ENCLOSED: \_\_\_\_\_

Method of Payment  
\_\_\_\_\_ Check enclosed payable to The University of Akron  
\_\_\_\_\_ Charge to credit card \_\_\_\_\_ Visa \_\_\_\_\_ MC \_\_\_\_\_ Discover

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_

**REGISTER TODAY!**  
Seating is limited.

**THE ECONOMY 2012:  
STRATEGIES IN AN UNCERTAIN  
GLOBAL ENVIRONMENT**

**Tuesday, March 20, 2012**

**The University of Akron  
Student Union Ballroom**

**The  
University  
of Akron**

## **The Economy 2012 Strategies in an Uncertain Global Environment**

**TUESDAY, MARCH 20, 2012  
7:00AM - 9:30AM  
STUDENT UNION BALLROOM**



The European debt crisis is on the center of everyone's mind in 2012. It has the potential to create wide and sudden swings in the global markets. Will a solution be reached, or will the problems spill over into the rest of the world? Hear these experts present the major issues for 2012 and beyond.

### **Keynote Speaker**

**James D. McCool, '82**  
Executive Vice President  
Institutional Services  
The Charles Schwab Corporation

### **Panelists**

**Paul Christopher**  
Chief International  
Investment Strategist  
Wells Fargo Advisors

**Lynn S. Hamilton**  
Senior Vice President  
Portfolio Manager  
Key Bank

Visit [www.uakron.edu/cba/economy2012](http://www.uakron.edu/cba/economy2012)  
for more information

Hosted by  
The University of Akron, College of Business Administration, Department of Finance  
in conjunction with  
The Finance Advisory Board

### **COLLEGE OF BUSINESS ADMINISTRATION**

The CBA is accredited by AACSB International at the highest attainable levels for both undergraduate and graduate programs, with additional accreditation of our accounting programs. Bloomberg BusinessWeek has ranked the part-time MBA program No. 1 in Northeast Ohio, 6<sup>th</sup> in the Midwest, and 34<sup>th</sup> in the nation. Both BusinessWeek and U. S. News & World Report have also ranked our undergraduate program among the best in the nation. In addition, our graduate program has been included in The Princeton Review's list of Best Business Schools every year since 2005.

### **DEPARTMENT OF FINANCE AT THE UNIVERSITY OF AKRON**

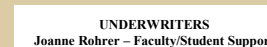
The mission of the Department of Finance is to provide students with a quality education that will prepare them for leadership positions within the finance profession. The department's curriculum offers students the opportunity to pursue one of two majors: Corporate Financial Management and Financial Services. Faculty specialties include corporate financial management, investments and investment management, international finance, and banking and financial institutions.

For more information on The Department of Finance, visit [www.uakron.edu](http://www.uakron.edu).

### **AGENDA The Economy 2012**

7:00 – 7:20	Registration
7:20 – 7:50	Breakfast
7:50 – 8:00	Welcome
8:00 – 8:20	Keynote Speaker James McCool '82 Executive Vice President Institutional Services The Charles Schwab Corporation
8:20 – 9:20	Panel Discussion and Q & A
9:20 – 9:30	Award Presentation
9:30	Adjourn

### **Corporate Sponsors:**



**The University of Akron**

College of Business Administration  
Department of Finance  
259 South Broadway Street  
Akron, Ohio 44325-4803