

2016 Value Investor Conference

AGENDA



updated: 4/12/2016

Thursday, April 28, 2016	University of Nebraska at Omaha Mammel Hall (67th St & Pine)	
4:30 p.m. - 5:15 p.m.	Registration	Mammel Hall Atrium
4:30 p.m. - 6:00 p.m.	Conference Bookstore Open	Mammel Hall Atrium
	Presenter	Topic
5:30 p.m. - 5:35 p.m.	Robert Miles, Author, UNO Faculty, Host	Welcome
5:35 p.m. - 6:15 p.m.	Tom Gayner, Co-CEO, Markel Corp	“Drinks”
6:15 p.m. - 6:45 p.m.	Reception	New Location: Scott Conference Center (6450 Pine St.)
6:45 p.m. - 7:15 p.m.	Dinner	Scott Conference Center
7:15 p.m. - 8:15 p.m.	Chuck Akre, Founder, CEO, CIO, Akre Capital Management	“What Are We After With Our Investment Strategy?”
Friday, April 29, 2016	University of Nebraska at Omaha Mammel Hall (67th St & Pine)	
7:30 a.m. - 8:00 a.m.	Registration - Breakfast & Coffee	Mammel Hall Atrium
8:00 a.m. - 6:00 p.m.	Conference Bookstore Open	Mammel Hall Atrium
8:00 a.m. - 8:40 a.m.	Aswath Damodaran, Author, Professor, NYU	“Price or Value? What’s Your Game?”
8:40 a.m. - 9:20 a.m.	Anna Nikolayevsky, Founder, CIO, Axel Capital Management	“Global Macro: Drinking Upstream From the Herd”
9:20 a.m. - 9:40 a.m.	Break	
9:40 a.m. - 10:20 a.m.	Brian Bares, CFA, Founder, CIO, Bares Capital Management	“Finding an Edge: Creating a Moat Around an Investment Process”
10:20 a.m. - 11:00 a.m.	Tren Griffin, Author, Sr Manager, Microsoft	“Charlie Munger: Evolving Value Investing Beyond Cigar Butts”



11:00 a.m. - 11:20 a.m.	Break	
11:20 a.m. - 12:00 p.m.	Jeff Auxier, Founder, CEO, CIO, Auxier Asset Management	“A Famer’s Perspective on Stock Picking Along the Food Value Chain”
12:00 p.m. - 1:00 p.m.	Lunch	Mammel Hall Atrium
1:00 p.m. - 1:40 p.m.	Fred Kiel, Author, Co-Founder, KWL Intl	“Return on Character: The Real Reason Leaders and Their Companies Win”
1:40 p.m. - 2:20 p.m.	Rupal Bhansali, CIO, Ariel Investments, International & Global Equities	“Contrarian Investing in Global Equity Markets”
2:20 p.m. - 2:40 p.m.	Break	
2:40 p.m. - 3:20 p.m.	Michael van Biema, Author, Professor, Founder, Managing Partner, van Biema Value Partners <i>AND</i> Allen Benello, CFA, Author, General Partner, White River Partners	“Concentrated Investing: Strategies of the World’s Greatest Concentrated Value Investors”
3:20 p.m. - 4:20 p.m.	François Rochon, Founder, President, Portfolio Manager, Giverny Capital [Canada]	“The Art of Investing”
4:20 p.m. - 4:40 p.m.	Break	
4:40 p.m. - 5:40 p.m.	Charles Brandes, Founder, Brandes Capital Management Roger Lowenstein, Chairman, Sequoia Fund; Author	“A Conversation with Charles Brandes by Roger Lowenstein”
5:40 p.m. - 5:45 p.m.	Robert Miles, Author, UNO Faculty, Host	Closing Remarks





Fall 2016

2016 Fall Genius of Warren Buffett Course

Dates: Sept. 29 - Oct. 1, and Oct. 20 - 22, 2016

36 Hours - includes catered dinner/lunch

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Corporate Values Summit

Date: May 4, 2017 Location: UNO, CBA, Mammel Hall

Speakers: TBA Fall 2016



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14th Annual Value Investor Conference

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