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WELCOME to the

2 4 CONFERENCE

Welcome to the 2024 South Florida Bond Traders Association Conference!

Our goal is to host the premier fixed income event and provide attendees the opportunity to network and discuss current issues facing our industry. We hope to deliver on that mission and make 2024 our most successful year yet!

Your Time is Valuable to Us

We kick things off Thursday with the Mortgage Bond Talks and Luncheon, followed by our Welcome Cocktail Reception and Dinner. Friday's Bond Talks begin with Breakfast with the GSEs and Supras, the Keynote Address by NY Times best-selling author Stephen Mansfield, the Economic Update by President of Bianco Research Jim Bianco, and the Compliance and Regulatory Update. The afternoon continues with a municipal luncheon. On Friday evening, we'll have a cocktail reception followed by dinner with seating by product area.

Saturday begins early with our recreational activities of golf, fishing, tennis, pickleball, and yoga. To close out the conference that afternoon, everyone is invited to join us for our Farewell Luncheon.

A Team Effort

I would like to thank our Premier Sponsor **Bloomberg L.P.**, and our 2024 SFBTA Corporate Partners for committing to support our organization throughout the year: **InspereX**, **JVB Financial Group**, **Mesirow**, **Multi-Bank Securities**, and **Zeus Financial**. This event could not happen without their generous support, along with the support of our conference sponsors. Be sure to visit our "Sponsor Street" area to learn more about these companies.

Thank you to all of our Bond Talk participants who are generously giving their time to speak at our conference. We can present our attendees with themes and topical discussion content year after year due to the preparation and insight of these industry leaders. I invite you to read more about each speaker in the pages that follow.

I'm grateful for our dedicated **Board of Directors**, who volunteer their time to help run the association, and plan charity events, Bond Talks, dinners, and activities.

You'll also see an amazing staff of onsite volunteers running our check-in desk, lending a hand in our sessions, or just assisting our attendees in having an all-around wonderful event experience. We appreciate our volunteers tremendously.

Finally, special recognition is due to the SFBTA Event Leadership Team, whose hard work and planning throughout the year helps ensure a successful event for all of us: A2 Events Founder/President Erin Branham and her team, SFBTA Coordinator Jaime Hogan, and SFBTA Vice President Krista Martin.

The South Florida Bond Traders Association is a non-profit organization dedicated to supporting those in need in our local community. Each of you continues to help us accomplish that goal, whether through your Association membership or sponsorship, your participation in our charity work days, or your attendance at our events.

We are pleased to share that the charitable organizations we're supporting this year are **BATI School**, LifeNet4Families, and A Second Chance Puppies and Kittens.

I'm proud of the South Florida fixed income community for joining together to host our clients and create a meaningful dialogue about our industry, while also giving back to the community.





George Barbar Founder and President, South Florida Bond Traders Association Senior Managing Director, Mesirow George@SouthFloridaBondTraders.org





Thursday, February 1, 2024

11:00 AM - 4:00 PM **EVENT CHECK-IN Mizner Center** 12:00 PM - 4:30 PM **Royal Palm Ballroom** MORTGAGE BOND TALKS & LUNCH **Erica Adelberg** Bloomberg Intelligence **MORTGAGE BOND TALKS & LUNCH** John Coleman RJ O'Brien **Dan Dujmic** Piper Sandler & Co. **Jeffrey Hingst** Bloomberg LP **David Rios** Brownstone Investment Group Walter Schmidt FHN Financial

6:00 PM - 9:30 PM

WELCOME COCKTAIL RECEPTION & DINNER Harborside Pool



Friday, February 2, 2024

8:00 AM - 2:00 PM

EVENT CHECK-IN

8:00 AM - 9:00 AM

BREAKFAST WITH THE GSEs AND SUPRAs

Mizner Center

Royal Palm Ballroom

<u>Susan Bilotta</u> Federal Farm Credit Banks Funding Corporation

Obert Limbani International Finance Corporation

Katherine Monteilh Freddie Mac

Hicham Rachdi The World Bank

Mike Schmid Farmer Mac

<u>Satomi Tarumizu</u> Inter-American Development Bank

<u>Violeta Tkachuk</u> FHLBanks Office of Finance

9:00 AM - 10:00 AM

WELCOME

<u>George Barbar</u> Mesirow

KEYNOTE ADDRESS

New York Times best-selling author **Stephen Mansfield**

10:00 AM - 11:00 AM

ECONOMIC UPDATE

Jim Bianco Bianco Research, L.L.C. **Royal Palm Ballroom**

Royal Palm Ballroom



Friday, February 2, 2024 (continued)

11:00 AM - 12:00 PM

COMPLIANCE AND REGULATORY UPDATE

<u>Lizzie Baird</u> Eversheds Sutherland

<u>Michael Decker</u> Bond Dealers of America

12:00 PM - 1:00 PM

BLOOMBERG LUNCHEON: Machine Learning, AI and the Evolution of Trading in Credit and Municipal Markets

<u>Darren Bloch</u> Bloomberg

<u>Andy Brennan</u> Bloomberg **Royal Palm Ballroom**

Ernesto Lanza MSRB

<u>Racquel Russell</u> FINRA

Royal Palm Ballroom

Lee O'Dwyer Bloomberg

6:00 PM - 7:30 PM	COCKTAIL RECEPTION	Grand Lawn
7:30 PM - 9:00 PM	PRODUCT-SPECIFIC DINNER	Grand Lawn
9:00 PM - 11:30 PM	AFTER PARTY	Cathedral Ballroom

Saturday, February 3, 2024

8:00 AM - 12:00 PM	FISHING TOURNAMENT	Off-Site
8:00 AM - 12:00 PM	GOLF TOURNAMENT	Resort Course
10:00 AM - 11:00 AM	YOGA	Grand Lawn
10:00 AM - 11:30 AM	TENNIS TOURNAMENT	Resort Courts
10:00 AM - 11:30 AM	PICKLEBALL	Resort Courts
12:30 PM - 2:00 PM	FAREWELL LUNCHEON	Spanish Terrace

SATURDAY EVENTS



FISHING TOURNAMENT

Shuttle to Hillsboro Inlet Fishing Center

TENNIS TOURNAMENT & PICKLEBALL

We will meet at the clubhouse at 10:00 am for a round robin tournament. Wear appropriate tennis shoes, attire, and sunglasses. Demo racquets are available for rental.

YOGA

Meet on the Grand Lawn a few minutes before 10:00 am. Mats and towels will be provided.

GOLF TOURNAMENT

Tournament play is a four person scramble format. Club rentals are available - contact the Pro Shop directly. Meet at the clubhouse at 8:00 am.

FAREWELL LUNCHEON

Please join us on the Spanish Terrace at 12:30 pm for a farewell luncheon to close out the conference.

South Florida Bond Traders Association, Inc. (SFBTA) is a non-profit, professional membership organization comprised of investment and trading professionals in the South Florida area. We represent many firms involved in the buying, selling, and trading of all fixed income securities.

SFBTA is committed to the following objectives:

- Provide members with educational opportunities including seminars, conferences, and training sessions relating to current issues facing the securities trading industry.
- Sponsor social and networking events to encourage members and other industry professionals to develop and deepen professional relationships.
- Support the South Florida community through funding of local charities and scholarships.

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- OI reached 21MM (up 25%)

- ADV reached 5.1M contracts

- OI reached 60M (new high)

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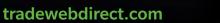
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The Boca Raton Guide



HARBORSIDE

- 0 MIZNER VILLAGE DR ENTRANCE
- 2 SE 5TH AVE ENTRANCE
- BUNGALOWS
- 4 BUNGALOWS POOL
- BUNGALOWS BIKE PICKUP 5
- 6 BUNGALOWS SHUTTLE
- 7 GOLF COURSE
- . GRAND LAWN
- 9 MIZNER CENTER:
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LEGEND



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R.J. O'Brien Securities Friday Night After Party

Multi-Bank Securities, Inc. Saturday Farewell Luncheon

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TCBC commends and supports the South Florida Bond Traders Association's objectives to educate, network, and support the local communities through volunteering and fundings of charities.

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