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## WELCOME to the



#### Welcome to the 2025 South Florida Bond Traders Association Conference!

We are thrilled to host you for the premier fixed-income event, where industry professionals come together to network, share insights, and tackle the pressing issues shaping our field. With your participation, we're confident 2025 will be our most impactful and successful year yet!

#### Making the Most of Your Time

Our exciting agenda begins Thursday with the Mortgage Luncheon and Bond Talks, followed by a Welcome Cocktail Reception and Dinner. On Friday, the day is packed with compelling Bond Talks, starting with Breakfast with the GSEs and Supras, a keynote address by Lieutenant General (Ret.) Robert Walsh, a fascinating Bloomberg discussion on AI, and an Economic Update from Jim Bianco. The day concludes with an evening of cocktails and dinner, featuring seating by product area for engaging conversations.

Saturday offers a change of pace, with recreational activities like golf, fishing, tennis, pickleball, and yoga starting bright and early. We'll close the event with a Farewell Luncheon, a perfect opportunity to reflect on the connections made and ideas shared.

#### **A Collective Effort**

This conference wouldn't be possible without the support of our incredible partners and contributors. A special thank-you goes to our Premier Sponsor, Bloomberg L.P., and our SFBTA Corporate Partners: InspereX, JVB Financial, Mesirow, Multi-Bank Securities, and Zeus Financial. Their generosity, along with that of our other conference sponsors, makes this event a reality. Be sure to visit our "Sponsor Street" area to connect with these organizations.

We're also deeply grateful to our Bond Talk participants for sharing their expertise and insights. Their thoughtful preparation ensures we bring you timely and relevant discussions year after year.

To our hardworking Board of Directors, who volunteer their time to lead the association, organize charity events, and plan this incredible conference — thank you. And to our amazing volunteers, whether greeting attendees, assisting in sessions, or ensuring a seamless experience, your dedication does not go unnoticed.

Finally, a heartfelt thanks to the SFBTA Event Leadership Team for their meticulous planning and tireless efforts: Erin Branham, Founder and President of A2 Events, and her team; SFBTA Coordinator Jaime Hogan; and SFBTA Vice President Krista Martin. Your work behind the scenes makes this event possible.

#### **Giving Back**

The South Florida Bond Traders Association is proud to be a nonprofit organization committed to making a difference in our local community. Whether through your membership, sponsorship, participation in charity events, or attendance at this conference, your support helps us fulfill that mission.

This year, we are excited to support Operation Healing Forces, continuing our tradition of giving back to those in need. Thank you for being part of the fixed-income community. Together, we are creating meaningful conversations about our industry while fostering positive change in the world around us.

We hope you enjoy an unforgettable conference experience!



Thank you,

George Barbar

Founder and President, South Florida Bond Traders Association, Inc. Senior Managing Director I Head of Regional Development and Strategy, Mesirow





# AGENDA



### Thursday, January 30, 2025

11:00 AM - 4:00 PM

**EVENT CHECK-IN** 

Mizner Center

12:00 PM - 4:30 PM

MORTGAGE BOND TALKS & LUNCH

Royal Palm Ballroom

**Erica Adelberg** 

Bloomberg Intelligence

**John Coleman** 

RJ O'Brien

**Dan Dujmic** 

Piper Sandler & Co.

**Hunter Haas** 

Bimini Capital Management

**Jeffrey Hingst** 

Bloomberg

PJ McGowan

**Academy Securities** 

**Walter Schmidt** 

**FHN Financial** 

6:00 PM - 9:30 PM

**MORTGAGE BOND TALKS & LUNCH** 

WELCOME COCKTAIL RECEPTION & DINNER

Harborside Pool



### Friday, January 31, 2025

8:00 AM - 2:00 PM

8:00 AM - 9:00 AM

**EVENT CHECK-IN** 

BREAKFAST WITH THE GSEs AND SUPRAS

**Edward Bridge** 

FHLBanks Office of Finance

Randy Ewell
The World Bank

**Obert Limbani** 

International Finance Corporation

Riley McLaughlin
Freddie Mac

**Darren Schlauch** 

Fannie Mae

Mike Schmid

Farmer Mac

**Dan Spencer** 

Federal Farm Credit Banks Funding Corporation

**Satomi Tarumizu** 

Inter-American Development Bank

9:00 AM - 10:00 AM

**WELCOME** 

Royal Palm Ballroom

Mizner Center

Royal Palm Ballroom

**George Barbar** 

Mesirow

**KEYNOTE ADDRESS** 

<u>Lieutenant General (Ret) Robert Walsh</u>
Advisory Board Member, Academy Securities



### Friday, January 31, 2025 (continued)

10:00 AM - 10:15 AM CHARITY HIGHLIGHT

10:15 AM - 10:45 AM THE AI JOURNEY: Royal Palm Ballroom

FROM VISION TO REALITY

Darren BlochLee O'DwyerBloombergBloomberg

**Brian Cerenzio**Bloomberg

10:45 AM - 11:45 AM ECONOMIC UPDATE Royal Palm Ballroom

**Jim Bianco** 

Bianco Research, L.L.C.

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 1, 2025

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

# **SPEAKERS**



### Mortgage Bond Talks & Lunch



Erica Adelberg
Bloomberg Intelligence



Jeffrey Hingst
Bloomberg



John Coleman RJ O'Brien



PJ McGowan
Academy Securities



**Dan Dujmic**Piper Sandler & Co.



Walter Schmidt
FHN Financial



Hunter Haas
Bimini Capital Management

# **SPEAKERS**



### Breakfast with the GSEs and Supras



Edward Bridge
FHLBanks Office of Finance



Darren Schlauch



Randy Ewell
The World Bank



Mike Schmid
Farmer Mac



Obert Limbani
International Finance Corporation



Dan Spencer
Federal Farm Credit Banks
Funding Corporation



Riley McLaughlin
Freddie Mac



Satomi Tarumizu
Inter-American Development Bank

Welcome & Host



George Barbar

### **Keynote Address**



Lieutenant General
(Ret) Robert Walsh
Advisory Board Member,
Academy Securities

# **SPEAKERS**



The Al Journey: From Vision to Reality



**Darren Bloch**Bloomberg



Lee O'Dwyer

Bloomberg



Brian Cerenzio

Bloomberg

**Economic Update** 



Jim Bianco
Bianco Research, L.L.C.

# 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**

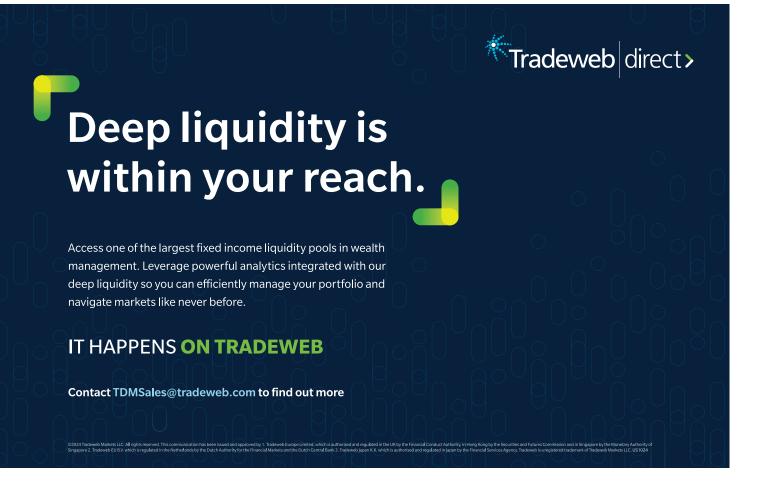
Meet on the Grand Lawn a few minutes before 10:00 am. Mats and towels will be provided.

#### **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.





To date, Operation Healing Forces has served over **10,000 individuals**, and has invested **\$25 million** in the development and implementation of essential programs which have proven to reduce significant health risk factors associated with the Special Operations Forces (SOF) community. OHF's programs support the mental, physical, emotional, and fiscal wellness of **more than 1,800 Special Operators and their families annually.** 

#### RETREAT PROGRAM

Operation Healing Forces' retreat program supports SOF marriages, which face higher divorce rates than average due to the demands of Tip of the Spear service. OHF's therapeutic retreats allow couples to reconnect, find respite from daily stress, and create positive memories through meaningful experiences. They also provide an opportunity for SOF members to connect with others, share their struggles, and find reassurance that they are not facing their challenges alone.

#### Annually, OHF hosts:

- 50 Therapuetic Couples Retreats
- 4 Respite Caregiver retreats



#### SOAR PROGRAM

The Special Operations Additional Resource (SOAR) Program distributes approximately **\$900,000 annually** in grants to Special Operations Forces families in need, providing direct support and resources, including:

- Immediate Needs Program (INP)
  - direct support in a medical or financial crisis
  - emergency travel and expenses
  - medical and adaptive equipment
  - funeral and memorial costs
- Job/Skill certification
- Financial Planning
- Career Transition Assistance
- Virtual Wellness Coaching



Operation Healing Forces' mission is to serve the needs of America's wounded, ill, injured, and fallen Special Operations Forces service members, veterans, their families, caregivers, and survivors through a suite of programs that promote long-term mental, physical, emotional, and fiscal well-being.



#### **Creating Bonds That Cure**

"This retreat provided me with much-needed connection to the military and veteran community. Since retiring, I have felt secluded due to PTSD, loss of my identity, and loss of my military community. Getting this opportunity to reconnect was a priceless gift and I can never thank you enough."

-OHF Therapeutic Retreat Alum

"Operation Healing Forces moved quickly and thouroughly into the gap that kept my family feeling lost, and discounted. While it's not been an easy journey, it has been a tremendous boost knowing that we have the caring individuals at OHF walking alongside us during the journey and helping make sure we have the tools we need to heal."

-OHF Immediate Needs Alum

"OHF gave me a new perspective in life. There are 22 veterans a day that commit suicide, because of OHF there's one less now."

-OHF Alum

#### **RESILIENCE**

SOF couples and family members experience positive emotions, a sense of control over critical aspects of life, and strengthened relationships.



Positive Emotions Strengthened Relationships Hope & Purpose Pride in Service

#### REHABILITATION

SOF couples and families receive support for healing the body, mind, and family unit.



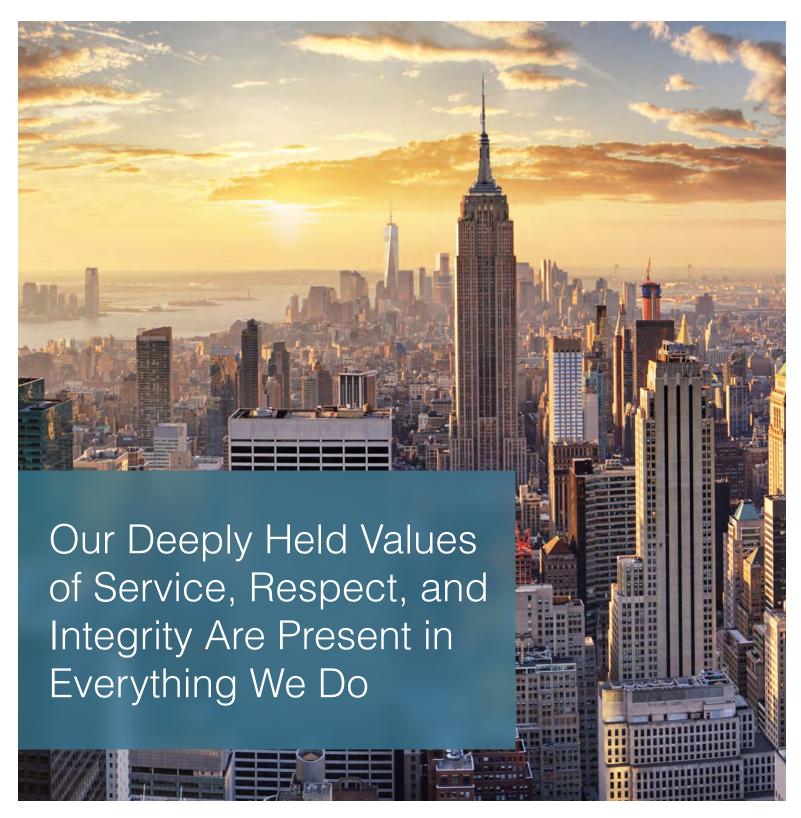
Connect to Care & Resources Promote Wellness Restorative Recreation

#### REINTEGRATION

SOF couples and families connect with the community, critical wellness information, and each other.



Couple & Peer Connection Communication Share Information & Resources Meaningful Support



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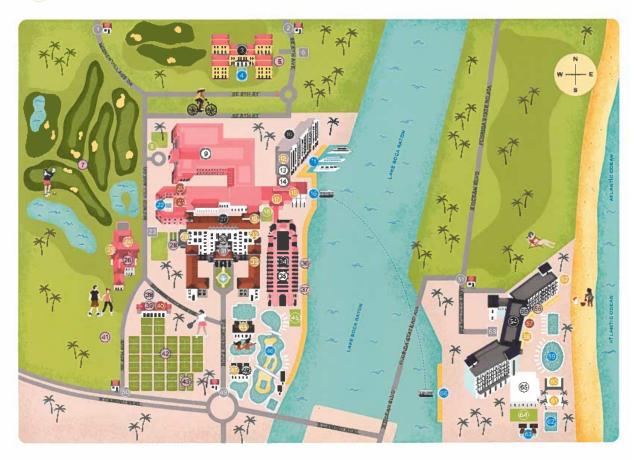
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mhesterberg@rjosecurities.com

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## The Boca Raton Guide



#### HARBORSIDE

- MIZNER VILLAGE DR ENTRANCE
- SE 5TH AVE ENTRANCE
- 8 BUNGALOWS
- 6 BUNGALOWS POOL
- 6 BUNGALOWS BIKE PICKUP
- 6 BUNGALOWS SHUTTLE
- 6 GOLF COURSE
- BRAND LAWN
- MIZNER CENTER:
  GRAND BALLROOM, ROYAL PALM BALLROOM,

ADDISON BALLHOOM, ESTATE BALLHOOM, SPANISH TERRACE, VERANDAS I-IV,

- REGISTRATION N 8 S
- 10 YACHT CLUB MARINA
- 12 FLYBRIDGE
- (3) YACHT CLUB MEETINGS AND EVENTS: VENETIAN, AMALFI, PORTOFINO, SANTA MARGHERITA, CAPRI
- CLOISTER MEETINGS AND EVENTS: CATHEDRAL, VALENCIA, MIZNER
- PRINCIPESSA RISTORANTÉ

- 16 HARBORSIDE TO BEACHSIDE WATER TAXI
- 🔟 PALM COURT
- (I) CLOISTER GARDEN
- 📵 MB SUPPER CLUB
- 20 SALON AT SPA PALMERA
- SPA PALMERA
- 22 SPA PALMERA POOL
- 23 HARBORSIDE SHUTTLE
- ME FLAMINGO GRILL
- 3 MULLIGANS
- 26 PRO SHOP
- **20** CLAISTER
- 28 BOCCE BALL COURT
- JAPANESE BOCCE CLUB
- SHOPS AT CLOISTER
- 33 CHĘCK IN FOR CLOISTER AND YACHT CLUB
- MAISON BOSE
- 3 SADELLE'S
- TOWER
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- 36 PROMENADE

#### water sports

- 38 HARBORSIDE BIKE PICKUP
- 39 RACQUET CLUB
- 40 HARBORSIDE FITNESS CLUB
- GOLF DRIVING RANGE/TOPTRACER
- 42 TENNIS COURTS
- 48 PICKLEBALL COURTS
- O POOL BAR
- 4 HARBORSIDE LAWN
- 46 HARBORSIDE POOL CLUB
- @ BANYAN BUNCH KIDS CLUB
- 481 SHOPS AT HARBORSIDE POOL CLUB
- 49 HARBORSIDE MAIN ENTRANCE
- CLUB MEMBER ENTAANÇE

#### BEACHSIDE

- 6 BEACHSIDE MAIN ENTRANCE
- SILVERSTREAM CAFE
- 53 BEACHSIDE SHUTTLE
- BEACH CLUB
  SHOPS AT BEACH CLUB
- 56 BEACHSIDE BIKE PICKUP
- 60 BEACHSIDE FITNESS CLUB
- BEACH CLUB LOUNGE
  BEACHSIDE POOLS

- 00 BEACH CLUB BAR
- MARISOL
- 62 FAMILY POOL
- 63 CABANA CLUB
  60 BEACHSIDE LAWN
- 65 BEACH CLUB MEETINGS AND EVENTS: DUNES BALLHOOM, SURFSIDES, REEF, CORAL, TIDES, COASTAL PATIO
- 66 BEACHSIDE TO HARBORSIDE WATER TAXI

#### LEGEND

- HOTELS
- DRINK AND DINE
- EXPERIENCES
- WELLNESS
- MEETINGS AND EVENTS
- AĘTAIL
- ON THE WATER
- AWNS
  - 📗 GETTING HERÊ
- SHUTTLES

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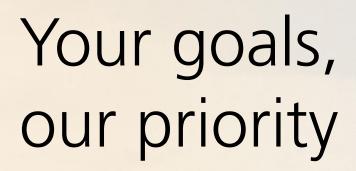
For more information, please contact:

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mesirow.com/capitalmarkets

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#### **CME 2024 TRADING HIGHLIGHTS:**

#### **US Treasury Options**

October Treasury Options Trade1.5MM contracts Daily in Election

#### **ERIS Futures**

- OI Double in Past Year
- reached 330K (\$33BN) (new high)

#### **Credit Futures**

-Avg Daily Volume of 10,452 During Quarterly Roll

#### **TBA Futures**

- New Cross Margining available with Treasury Futures

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# SFBTA

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.

www.SouthFloridaBondTraders.org







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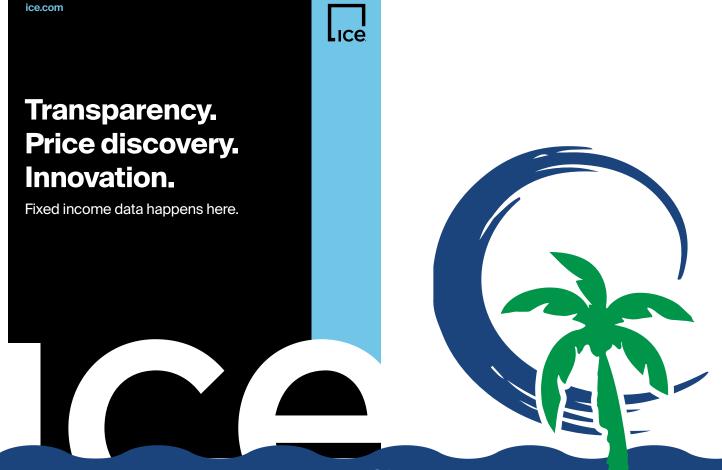


TCBC commends and supports the South Florida Bond Traders Association's objectives to educate, network, and support the local communities through volunteering and fundings of charities.

Matt Sell (President), Nick Peters (Vice President), Mitch Wolkow (Treasurer), and the Board of Governors

Save the Date - TCBC 2025 - July 16th and 17th, 2025

www.twincitybondclub.com



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### R.J. O'Brien Fixed Income Group

Thursday Mortgage Luncheon

#### **Tradeweb Direct**

Thursday Night Cigar Roller

#### **SOLVE**

Thursday Welcome Cocktail Reception

#### **InspereX**

Thursday Welcome Dinner Breakfast with the GSEs & Supras

#### **Academy Securities**

Keynote Speaker

#### Société Générale

Friday Night Cocktail Reception

#### **R.J. O'Brien Securities**

Friday Night After Party

#### Multi-Bank Securities, Inc.

Saturday Farewell Luncheon

### *Thank You* for your service:



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# SAVE THE DATE



LEARN - NETWORK - GIVE BACK



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