



20 **15 YEARS** **26**
SFBTA
CONFERENCE
BOCA RATON | JAN 29-31



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WELCOME to the **2026 SFBTA CONFERENCE**

Welcome to the 2026 South Florida Bond Traders Association Conference!

We are thrilled to host you for our 15th annual premier fixed-income event, where industry professionals come together to network, exchange ideas, and engage in thoughtful dialogue on the issues shaping today's markets. With your participation, we're confident 2026 will be our most impactful and successful year yet!

Making the Most of Your Time

Our conference begins on Thursday with the Mortgage Bond Talks and Breakfast, followed by a Welcome Cocktail Reception and Dinner.

Friday features a full day of compelling Bond Talks, beginning with Breakfast with the GSEs and Supras, followed by a Keynote Address from Retired Navy Seal Andy Stumpf, a Bloomberg discussion on AI, an Economic Update from Jim Bianco of Bianco Research, and a Fireside Chat with FINRA CEO Robert Cook, Bond Dealers of America CEO Mike Nicholas, and Mesirow COO Jeffrey Levine. The day concludes with an evening of cocktails and dinner, featuring seating by product area to encourage meaningful, focused conversations.

Saturday morning offers a change of pace with golf, tennis, pickleball, and yoga. We then conclude with a Farewell Luncheon — an opportunity to reflect on connections made, relationships strengthened, and ideas shared.

A Collective Effort

This conference would not be possible without the generous support of our partners and contributors. A special thank-you goes to our Premier Sponsor, Bloomberg L.P., and our SFBTA Corporate Partners: Cohen & Company Securities, InspireX, Mesirow, Multi-Bank Securities, and Zeus Financial. Their generosity, along with that of our other conference sponsors, makes this event a reality. We encourage you 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 Board of Directors, who volunteer their time to lead the association, organize charity events, and champion this incredible conference — thank you.

To our amazing volunteers — whether you are 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 serving both our industry and our community. Your membership, sponsorship, and participation enable us to support meaningful causes throughout the year.

This year, we are honored to support Folds of Honor and The George Snow Scholarship Fund, continuing our tradition of giving back to those who make a lasting impact in our community.

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 | Head of Regional Development
and Strategy, Mesirow

2026 15 YEARS
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BRINGING EDUCATIONAL DREAMS TO LIFE ACROSS THE NATION.



Tyler Humphrey
San Jose State University



Kady Casteel
Oklahoma State University



Taylor Spires
Newberry College

FOLDS OF HONOR 2025 - 2026 ACADEMIC SCHOOL YEAR IMPACT

In the 2025 - 2026 academic school year, Folds of Honor has awarded nearly **11,000** educational scholarships.

Those 11,000 scholarships total over **\$53 million** in educational impact.

While these awards set an all-time single-year record, approximately **7,700** qualified applicants did not receive full funding due to limited resources.

OUR MISSION IS UNWAVERING

HONOR THEIR SACRIFICE. EDUCATE THEIR LEGACY. UNITE AMERICANS AROUND ALL THOSE WHO SERVE.

Join us in supporting the families of our nation's heroes. With your help, we can continue to empower these deserving military and first responder families through educational scholarships. The need is great, but together we can be greater.



Folds of Honor is a leading non-profit organization that provides educational scholarships to the children and spouses of America's fallen or disabled military service members and first responders. Folds of Honor was founded in 2007 by Lt Col Dan Rooney and has grown from a vision into a movement. The folded flag is a constant reminder of those who have paid the ultimate price for our freedom. It inspires us to help equip and educate their loved ones in need of our support. Thank you for embracing the call.

ABOUT FOLDS OF HONOR

73,000

Since 2007, Folds of Honor has awarded nearly **73,000** educational scholarships.

91%

A total of **91%** of every dollar we spend supports our scholarship program.

\$340M

Those 73,000 scholarships total over **\$340 million** in educational impact.

43%

Minority recipients represent **43%** of all scholarships awarded.

4-STAR

Folds of Honor is rated 4 out of 4 stars by Charity Navigator.

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Folds of Honor Dept. #13, Tulsa, OK 74182 | 918-274-4700
CONTACT@FOLDSOFHONOR.ORG | FOLDSOFHONOR.ORG

AGENDA



Thursday, January 29, 2026

8:00 AM - 12:00 PM

EVENT CHECK-IN

Mizner Center

9:00 AM - 12:00 PM

MORTGAGE SESSIONS
& BREAKFAST

Royal Palm Ballroom

MORTGAGE SESSIONS & BREAKFAST



Erica Adelberg
Bloomberg Intelligence



John Coleman
RJ O'Brien, a StoneX company



Dan Dujmic, CFA, CMT, FRM
Piper Sandler & Co.



Jeff Hingst
Bloomberg



Greg Kerr
Freddie Mac



Walter Schmidt
FHN Financial

6:00 PM - 9:30 PM

WELCOME RECEPTION
& DINNER

Harborside Pool



Friday, January 30, 2026

8:00 AM - 12:00 PM

EVENT CHECK-IN

Mizner Center

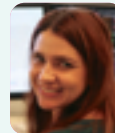
8:00 AM - 9:00 AM

BREAKFAST WITH THE GSEs AND SUPRAS

Royal Palm Ballroom



Susan Bilotta
*Federal Farm Credit
 Banks Funding
 Corporation*



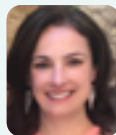
Michele McKenzie
Farmer Mac



Edward Bridge
*FHLBanks Office
 of Finance*



Mahendra Singh
The World Bank



Kayla Gjata
Freddie Mac



Hicham Rachdi
The World Bank



Donovan Lawhorn
Fannie Mae



Satomi Tarumizu
*Inter-American
 Development Bank*



Obert Limbani
*International
 Finance Corporation*

9:00 AM - 10:00 AM

WELCOME

Royal Palm Ballroom



George Barbar
Mesirow

KEYNOTE ADDRESS



Andy Stumpf
Retired Navy SEAL

AGENDA



Friday, January 30, 2026 (continued)

10:00 AM - 10:30 AM	INSIDE THE MODERN TRADING DESK: AI, AUTOMATION & EXECUTION AT SCALE	Royal Palm Ballroom
	 <u>Antonio Amaral</u> <i>Bloomberg</i>	 <u>Joseph Tufo</u> <i>Bloomberg</i>
	 <u>Rob Pantages</u> <i>Bloomberg</i>	
10:30 AM - 11:30 AM	ECONOMIC UPDATE	Royal Palm Ballroom
	 <u>Jim Bianco</u> <i>Bianco Research, L.L.C.</i>	
11:30 AM - 12:15 PM	FIRESIDE CHAT	Royal Palm Ballroom
	 <u>Robert Cook</u> <i>FINRA</i>	 <u>Mike Nicholas</u> <i>Bond Dealers of America</i>
	 <u>Jeffrey Levine</u> <i>Mesirow</i>	
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	CASINO NIGHT AFTER PARTY	Cathedral Ballroom

Saturday, January 31, 2026

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	Croquet Lawn
12:30 PM - 2:00 PM	FAREWELL LUNCHEON	Spanish Terrace

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 **RJO'Brien**
a StoneX company

SPEAKERS



Mortgage Sessions & Breakfast



Erica Adelberg

Bloomberg Intelligence



Greg Kerr

Freddie Mac



John Coleman

RJ O'Brien, a StoneX company



Walter Schmidt

FHN Financial



Dan Dujmic, CFA, CMT, FRM

Piper Sandler & Co.



Jeff Hingst

Bloomberg

SPEAKERS



Breakfast with the GSEs and Supras



Susan Bilotta

*Federal Farm Credit Banks
Funding Corporation*



Michele McKenzie

Farmer Mac



Edward Bridge

FHLBanks Office of Finance



Hicham Rachdi

The World Bank



Kayla Gjata

Freddie Mac



Mahendra Singh

The World Bank



Donovan Lawhorn

Fannie Mae



Satomi Tarumizu

Inter-American Development Bank



Obert Limbani

International Finance Corporation

SPEAKERS



Welcome & Host



George Barbar
Mesirow

Keynote Address



Andy Stumpf
Retired Navy SEAL

Inside The Modern Trading Desk: AI, Automation & Execution At Scale



Antonio Amaral
Bloomberg



Joseph Tufo
Bloomberg



Rob Pantages
Bloomberg

SPEAKERS



Economic Update



Jim Bianco
Bianco Research, L.L.C.

Fireside Chat



Robert Cook
FINRA



Jeffrey Levine
Mesirow



Mike Nicholas
Bond Dealers of America



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The UBS Rates team is proud to sponsor the South Florida Bond Traders Association Conference.



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SATURDAY EVENTS



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 Croquet 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.



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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



Community Involvement

Networking Events



Annual Conference

Ideas that help you stay ahead.

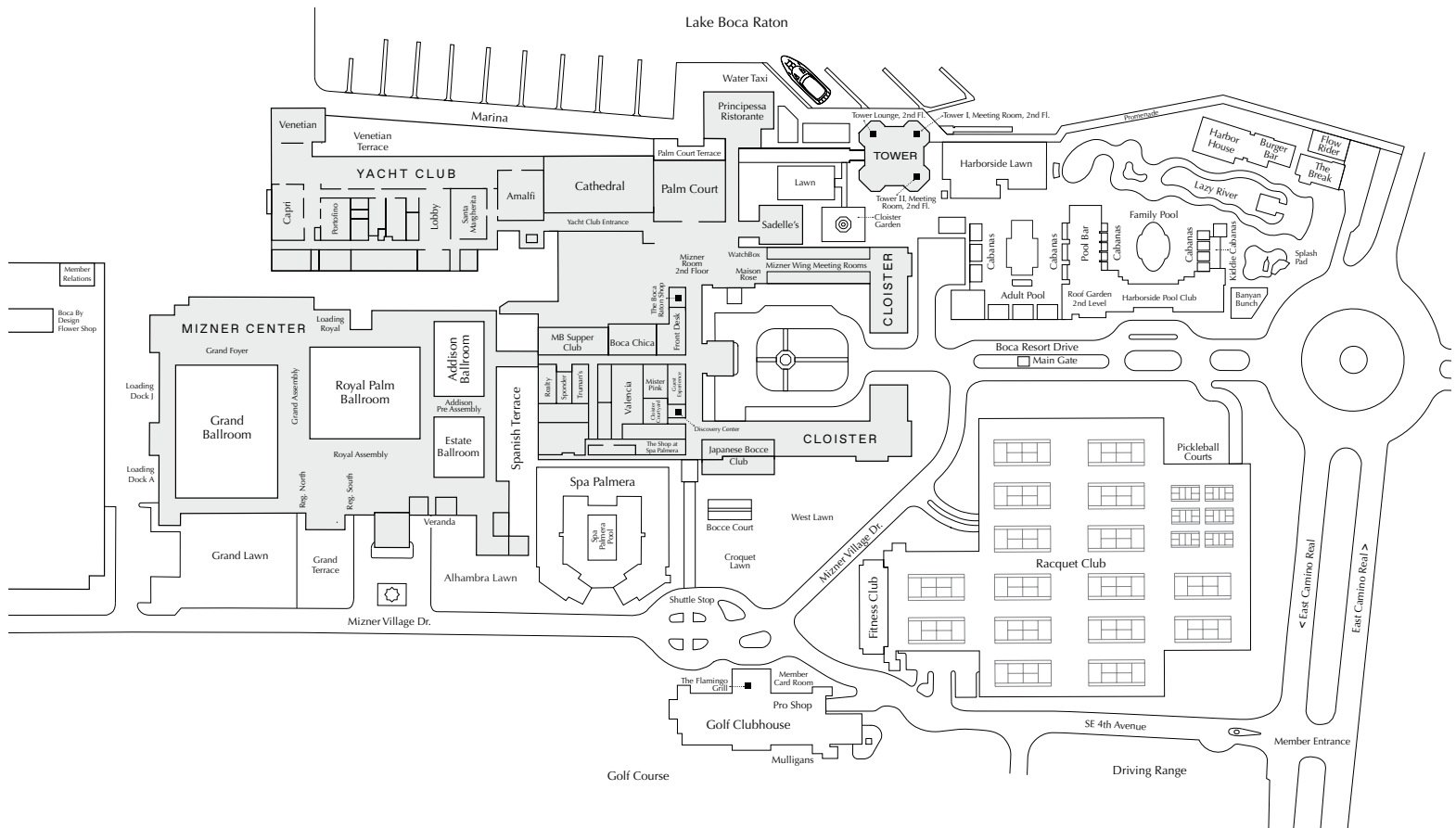
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TCBC commends and supports the South Florida Bond Traders Association's objectives to educate, network, and support the local communities through volunteering and fundings of charities.

Nick Peters (President), Mitch Wolkow (Vice President), Jeffrey Wall (Treasurer), and the Board of Governors

Save the Date - TCBC 2026 - July 15th and 16th, 2026

www.twincitybondclub.com

The ICE logo is located in the top right corner of the advertisement, consisting of a stylized blue square icon followed by the word "Ice" in a white sans-serif font. The advertisement has a black top half and a light blue bottom half. The text "Transparency. Price discovery. Innovation." is written in bold black font on the blue background. Below it, the phrase "Fixed income data happens here." is in a smaller black font. The website "ice.com" is at the bottom left. There are several small white and blue geometric shapes scattered around the text.

**Transparency.
Price discovery.
Innovation.**

Fixed income data happens here.

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RJ O'Brien, a StoneX company
Thursday Mortgage Sessions Breakfast

SOLVE
Thursday Welcome Cocktail Reception

InspereX
Thursday Welcome Dinner
Friday Morning GSE Breakfast

Tradeweb
Thursday Night Cigar Roller

Investortools
Friday Snack Break

Société Générale
Friday Night Cocktail Reception

Mesirow
Friday Night Product Dinner

Multi-Bank Securities, Inc.
Saturday Farewell Luncheon

Thank You for your service:



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2027
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