



Elevate Your Fixed Income Portfolio

Monday, November 9, 2026

Chicago Board of Trade
141 W Jackson Blvd

CBOE Trading Floor Tour and Closing Bell Ringing

The LaSalle Chicago
Autograph Collection
208 S LaSalle St

Welcome Reception at the Solarium and Library

Tuesday, November 10, 2026

The Old Post Office
433 W Van Buren St

Breakfast

Opening Remarks and Pre-quiz

Sean Dranfield

MODULE 1

Taylor Huffman

The Problem: The Use and Abuse of Traditional Metrics

MODULE 2

Adam Wolcott

Our Moneyball Solution

Lunch And Learn Breakout Roundtables

- Structured Credit in Focus:
Income, Protection and Relative Value

Lars Anderson
Michael Isroff

- Beyond Tax-Free:
Opportunity in Municipal Bonds

Michael Plaiss
Mohammed Murad

- The Corporate Credit Playbook:
Finding Value in Today's Market

Tony Harris
Max Salk

- Quantitative Analysis:
How Shape Management Works in Practice

Nick Romero
Mark Peiler

MODULE 3

Sean Dranfield

The PTAM Playbook

MODULE 4

Taylor Huffman

Changing the Shape of Fixed Income

Portfolio Manager Q&A

Wrap-up