

Bristol Gate APIC DougE Agenda



The Broadmoor Hotel – 7770 Milton E Proby Pkwy, Colorado Springs, CO 80916

October 7, 2025

6:30PM - 7:00PM Welcome Cocktails

7:00PM – 9:00PM Dinner

Location: Donald Ross Room in the Spa, Golf & Tennis Complex

October 8, 2025

7:30AM-9:00AM Breakfast

9:00AM-9:15AM Welcome & Introduction

Patrick Hamm, Chief Operating Officer & Mike Capombassis, President & Chair of Investment Committee

9:15AM-10:30AM Bristol Gate's Investment Process

Izet Elmazi, Chief Investment Officer, Poorya Ferdowsi, Chief Data Scientist, & Mike Capombassis, President & Chair of Investment Committee

10:30AM-10:45AM Break

10:45AM-12:00PM Continuous Learning: Using Data Science to enhance investor outcomes

Patrick Hamm, Chief Operating Officer & Poorya Ferdowsi, Chief Data Scientist

12:00PM-1:00PM Lunch

1:00PM-2:00PM Understanding Wealth Demographics

David Finley, President and Chief Strategist, Wealth Brand Partners



2:00PM-3:00PM	Artificial Intelligence: Potentials & Pitfalls <i>Poorya Ferdowsi, Chief Data Scientist, & Aman Dhaliwal, Analyst</i>
3:00PM - 3:15PM	Break
3:15PM - 4:15PM	Fitting High Dividend Growth in Equity Portfolios <i>Clayton Kelly, Portfolio Specialist, & Jamie Houston, Head of Relationship Management</i>

Location: Main Ballroom, Broadmoor Main Building

6:00PM-10:00PM	An evening of friendly competition and conversation <i>Dinner will be served</i>
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Location: Play at the Broadmoor, Broadmoor West Building (across the lake)

October 9, 2025

7:30AM-9:00AM	Breakfast
9:00AM-10:30AM	Unlocking Your Productivity with Technology <i>Chris Morris, Head of US Business Development, Nick Biedermann, Executive Director, Morgan Stanley Consulting Group, & Chelsea Clark, Executive Director, Morgan Stanley Consulting Group</i>
10:30AM-10:45AM	Break
10:45AM-12:00PM	Unlocking Your Productivity with Technology <i>Chris Morris, Head of US Business Development, Nick Biedermann, Executive Director, Morgan Stanley Consulting Group, & Chelsea Clark, Executive Director, Morgan Stanley Consulting Group</i>

Location: Main Ballroom, Broadmoor Main Building