

DAY 1 – MONDAY 10/20

2014

10:00 AM	Registration	
11:05 AM	Welcome	Mary Callahan Erdoes J.P. Morgan Asset Mgt
11:10 AM	Best Idea	David Einhorn Greenlight Capital
11:30 AM	Fireside Chat	Fred Wilson Union Square Ventures Philippe P. Laffont Coatue Mgt
11:55 AM	Market Overview	William H. Eigen III J.P. Morgan Asset Mgt
12:05 PM	Best Idea	Anna Nikolayevsky Axel Capital Mgt
12:20 PM	Macro View	Seth A. Klarman The Baupost Group David Einhorn Greenlight Capital
12:55 PM	Impact of Ebola	Jeffrey D. Sachs The Earth Institute at Columbia University
1:10 PM	Networking Lunch	
1:45 PM	Introduction	Barry Sommers JPMorgan Chase
1:50 PM	Retail	Mickey Drexler J.Crew Group, Inc. Walter Robb Whole Foods Market <i>moderator:</i> Barry Sternlicht Starwood Capital Group
2:20 PM	Best Idea	Jim Chanos Kynikos Associates LP
2:40 PM	Energy	Ahmad Chatila SunEdison; Andrew Hall Astenbeck Capital Mgt, LLC / Phibro Trading, LLC <i>moderator:</i> Richard Kauffman New York State Energy Research & Development Authority
3:10 PM	Networking & Coffee Break	
3:35 PM	Welcome Back	
3:40 PM	Lightning Round	Scott Ferguson Sachem Head Capital Mgt Zachary Schreiber PointState Capital Tom Wagner Knighthead Capital Mgt, LLC <i>moderator:</i> John A. Griffin Blue Ridge Capital
4:25 PM	Best Idea	Ivy Zelman Zelman Associates
4:45 PM	Macro View	Stan Druckenmiller Duquesne Family Office Paul Tudor Jones II Tudor Investment Corporation
5:15 PM	Market Wrap	John Griffin Blue Ridge Capital Larry Robbins Glenview Capital Mgt
5:35 PM	Sessions Conclude	

DAY 2 – TUESDAY 10/21

7:00 AM	Registration & Networking Breakfast	
8:00 AM	Welcome	
8:10 AM	Best Idea	Larry Robbins Glenview Capital Mgt
8:30 AM	Best Idea	Keith Meister Corvex Capital Mgt
8:50 AM	Lightning Round	Matt Sidman Three Bays Capital Traci Lerner Chesapeake Partners Ricky Sandler Eminence Capital <i>moderator:</i> Larry Robbins Glenview Capital Mgt
9:30 AM	Policy View	Lawrence H. Summers Harvard University; Glenn Hutchins Silver Lake
10:00 AM	Networking & Coffee Break	
10:30 AM	Best Idea	Whitney Tilson Kase Capital Mgt
10:55 AM	The Next Small Thing	Dean Kamen DEKA Research & Development Corporation
11:10 AM	Introduction	
11:15 AM	Fireside Chat	Eric E. Schmidt Google Inc. Joe Lonsdale Formation 8
11:45 AM	Best Idea	Nehal Chopra Tiger Ratan Capital Mgt
12:05 PM	Networking Lunch	
1:05 PM	Introduction	
1:15 PM	Media	Rich Riley Shazam; David Zastav Discovery Communications <i>moderator:</i> Robert Pittman iHeartMedia
	Best Idea	Daniel S. Loeb Third Point
2:00 PM	Fireside Chat	Tom Pritzker Hyatt Hotels Corporation Barry S. Sternlicht Starwood Capital Group
2:30 PM	Lightning Round	Nathaniel August Mangrove Partners Vikram Deswal East Bridge Capital Mgt Amish Mehta SQN Investors Oleg Nodelman EcoR1 Capital <i>moderator:</i> David Einhorn Greenlight Capital
3:15 PM	Networking & Coffee Break	
3:30 PM	Welcome Back	
3:35 PM	Best Idea	David Tepper Appaloosa Mgt
3:55 PM	Fireside Chat	John Sykes iHeartMedia Harvey Weinstein The Weinstein Company
4:10 PM	Activism	Laurence D. Fink BlackRock; Carl Icahn Icahn Enterprises; Daniel S. Loeb Third Point <i>moderator:</i> Lee S. Ainslie III Maverick Capital Mgt, LLC
5:10 PM	Market Wrap	John A. Griffin Blue Ridge Capital David Tepper Appaloosa Mgt
5:35 PM	Sessions Conclude	