



Speaker Bios

Tuesday



Christopher L. Oakley is vice president and coordinating regional executive of the Bank's Regional Economic Information Network (REIN). In this role he serves as the lead regional executive, assuming responsibility for coordinating the REIN strategic plan, outputs, and talent pipeline for the Sixth District. He also works with the Research director to determine REIN engagements and priorities, consolidate inputs from the REIN team for monetary policy deliberations, and provide guidance to the REIN team on performing their responsibilities.

He is responsible for the Jacksonville Branch's board of directors and the District's Advisory Council on Trade and Transportation, and provides regional input into the Atlanta Fed's monetary policy process.

Outside of the Bank, he is involved in a number of activities, including having roles on the Florida Council on Economic Education, the Disability:IN First Coast, and the JaxUSA Partnership. He is a member of the Leadership Jacksonville Class of 2010.

He joined the Jacksonville Branch in 1988 as a management intern in the Cash Services Department and has held various management positions, including operational and administrative oversight in cash services, payment services, and human resources. Mr. Oakley was promoted to financial services director in 1992 and then to assistant vice president in 1996. He was named assistant branch manager in 1997, vice president and branch manager in 2002, vice president and regional executive in 2007, and was previously responsible for branch support services, law enforcement, cash services, check processing, and check adjustments.

A native of Hendersonville, North Carolina, and raised in Dalton, Georgia, Mr. Oakley received his bachelor's degree in management and a certificate in industrial and organizational psychology from the Georgia Institute of Technology. He has also participated in the executive education curriculum at the University of Virginia and the Federal Reserve System's Senior Officer Development program.

Opening General Session: Tuesday, Feb. 7: Dialogue with the Federal Reserve



Tony Crescenzi is an executive vice president, market strategist and generalist portfolio manager in the New York office. He is also a member of the Investment Committee. Prior to joining PIMCO in 2009, he was chief bond market strategist at Miller Tabak, and worked for both Lehman Brothers and Prudential Bache.

Mr. Crescenzi has written six books, including "The Strategic Bond Investor" and "Beyond the Keynesian Endpoint." He regularly appears on CNBC and Bloomberg television and in financial news media.

Mr. Crescenzi taught in the executive MBA program at Baruch College from 1999-2009. He has 39 years of investment experience and holds an MBA from St. John's University and an undergraduate degree from the City University of New York.

General Session: Tuesday, Feb. 7: Macroeconomic and Investment Outlook



Amy Moline is the Founder and CEO of KeyBella Homes Group with Exp Realty. She and her team are ranked in the top 1% of the real estate industry and have a thorough understanding of helping others sell and buy real estate. While most agents in the industry average selling 5 homes per year, Amy and her team have sold over 1700 homes since 2005.

KeyBella's focus has always been to exceed expectations for their clients.

General Session: Tuesday, Feb. 7: Preparing Your Clients for the 2023 Housing Market



Ted Randall is a senior portfolio manager at Avantis Investors®. Prior to Avantis Investors' establishment in 2019, Ted served as vice president and portfolio manager for domestic and international equity strategies at Dimensional Fund Advisors (DFA). In this role, Ted served as portfolio manager and portfolio advocate for 11 U.S. and non-U.S. developed, emerging market and blended asset allocation mutual funds and separately managed accounts.

Ted earned a master's in business administration from the University of California Los Angeles Anderson School of Management and a Bachelor of Science in business administration from the University of Southern California.

General Session: Tuesday, Feb. 7: Where do Indexes – and Factors – Fall Short?



Mike McKennon has played golf for as long he can remember and achieved his first hole-in-one at the age of ten, so it should come as no surprise that he played golf for Oregon State University while he studied journalism.

In his early career, he found himself working in business and advertising, and eventually landed a job with Nike Golf as a sales representative for golf apparel. Winning both the Regional and National Sales Rep of the Year awards, he helped develop the concept for the Mobile Pro Shop when he noticed apparel and equipment were competing for the same business. The Mobile Pro Shop is now considered an industry standard in the golf business.

With the spirit of an entrepreneur, Mike built a business from scratch and later sold it. As a former business owner, Mike understands the financial and emotional hurdles that go into selling a business, and he brings that experience with him to the FPT team. Mike works across multiple departments, including Business Development, Legal, and Valuation & Member Services. He supports clients and helps them navigate their experience with FP Transitions, ensuring each client gets the most out of their engagement and has the best experience possible.

In his free time, you can find him playing golf or enjoying the Oregon outdoors with his two daughters. He continues to play competitive amateur golf in the Pacific Northwest.



James Hughes joined Live Oak Bank in 2013. Since then he has helped hundreds of businesses achieve their goals through financing. Live Oak Bank specializes in lending to investment advisors for acquisitions, succession, working capital, refinance, breakaway or tuck-in and commercial real estate purchases.

Live Oak Bank is dedicated to treating every customer like they are the only customer, while creating the American Dream for many aspiring and existing business owners. Interested to learn more?

General Session: Tuesday, Feb. 7: Internal Succession: Is it Possible



Ben Hammer, CFA, is Head of Client Development for Vanguard Personalized Indexing where he is dedicated to forming and sustaining long-term partnerships with Registered Investment Advisors (RIAs), Banks, and Broker Dealers.

In addition, Mr. Hammer manages relationships with RIAs in the Pacific Northwest for Vanguard Financial Advisor Services™. Mr. Hammer joined Vanguard in 2005, and before his current roles he represented Vanguard ETFs® to institutional asset managers nationwide.

Mr. Hammer earned a B.S. in psychology from the University of Illinois. He is a CFA® charterholder, a member of the CFA Society of Portland and CFA Society of Seattle and holds FINRA Series 7 and 63 licenses.

Breakout Session: Tuesday, Feb. 7: An Introduction to Personalized Indexing



Kelleigh Klein is the Executive Director of Allegro, a retirement lifestyle community in Winter Park. Kelleigh has over 20 years of experience working in the healthcare industry, 10 of which have been focused on senior healthcare. Prior to working with seniors, Kelleigh managed corporate and community health programs for BayCare Health System and Johnson and Johnson Healthcare. She received her bachelor's degree in Exercise and Sport Science from the University of Florida. She is also a member of the Rotary Club of Winter Park and a volunteer for Commission 127.

Breakout Session: Tuesday, Feb. 7: Trends in Senior Living



Shane Schofield is a Client Portfolio Manager at Invesco Real Estate. Shane's primary responsibilities is to engage with broader Invesco distribution and grow IRE's presence in the financial intermediary channel. Shane began his investment career in 1993 and joined Invesco Real Estate in 2020.

Prior to joining Invesco, he was an Executive Vice President and Head of Institutional and Retail Intermediary Distribution for Hartman Real Estate. He was responsible for leading the firm's strategies for all Capital Raise initiatives, Marketing and National Accounts. Prior to Hartman Real Estate, Shane was with JLL/LaSalle Investment Management, Hines Real Estate, Franklin Templeton Investments, American Funds, Putnam Investments and began his career with Van Kampen Merritt.

Shane earned a Bachelor of Business Administration with a major in Finance from University of Georgia and Master of Business Administration with a major in Management from Georgia State University. He is a Certified Investment Management Analyst (CIMA).

Breakout Session: Tuesday, Feb. 7: Beyond 60/40 Understanding the Benefits of Real Estate



Janelle M. Pedulla, CPA, MBA, is an accountant with LongwoodCPA and is responsible for providing full client service with an emphasis on small business and start-ups.

As a previous business owner, Janelle earned her B.S. in Commerce and her M.B.A. with a concentration in Accounting from Niagara University in Lewiston, New York. I am originally from Niagara Falls, New York and moved to Central Florida in April of 2015.

George Rosen is a certified business broker who specializes in business valuations for privately held companies. His expertise has help businesses prepare for sale, financial planning, estate planning and gifting purposes.



George consults in operations, finance and business strategies to help prepare for succession planning. Mr. Rosen earned his BSBA in Accounting at the University of Central Florida, and AA in Business Administration from the University of Hawaii. Mr. Rosen is a presenter for Lorman Education Services on Business Valuation for main-street businesses.

Breakout Session: Tuesday, Feb. 7: Having the "Talk"



Joyce Huang, CFA, is vice president and senior client portfolio manager for American Century Investments, a premier investment manager headquartered in Kansas City, Missouri. She is based in the company's New York office.

Joyce is responsible for representing portfolio management in communicating fixed income investment strategies and results to the firm's clients. She joined American Century in 2018 from First State Investments, where she was an investment director for fixed income and multi-asset solutions.

Previously, she served in roles as a senior investment strategist and senior portfolio specialist for BNY Mellon Investment Management. Prior to that, she was a vice president and account manager in the capital markets fixed income group at Citigroup. She started in the industry with Lehman Brothers/Barclays Capital, where she was a vice president within their fixed income research group. She has worked in the investment industry since 2006.

Joyce holds a bachelor's degree in economics from the Wharton School at the University of Pennsylvania. She is a CFA® charterholder and a member of the CFA Institute.

Jeremy Deering, CFA, is director of Portfolio Analysis for American Century Investments, an independent, privately controlled, pure-play asset management firm founded in 1958.



Jeremy co-founded American Century Investments' portfolio construction team and helped design the firm's in-house portfolio construction tools. He is responsible for consulting with intermediary and institutional clients on asset allocation. In this role, he works with clients on evaluating their investment models and offering recommendations for possible enhancements. Prior to his current role, he was a senior institutional product manager and competitive analyst, conducting in depth research on firm and competitor offerings. Before joining American Century Investments, Jeremy worked in the Institutional Sales & Marketing group at Waddell & Reed Financial. He began his career working in a DNA laboratory, conducting genetic testing.

Jeremy earned a bachelor's degree in microbiology from the University of Kansas and an MBA with a concentration in finance from Baker University. He is a CFA Charterholder and holds both his series 7 and 63 licenses.

General Session: Tuesday, Feb. 7: Model Behavior: The Hidden Risks of Undermining Portfolio Performance

Concurrent Sessions



Jeffrey Clark, LUTCF, ACS, FLMI, CFS joined Jackson's Advanced Strategies in September 2011. Prior to joining Jackson, he was the head of Guardian's Retirement Center of Excellence in New York City, which also focused on growing advisors' businesses through a sales-oriented approach to advanced-planning concepts.

A frequent industry speaker and author on retirement design, funding, and sales, Jeff has addressed the Association for Advanced Life Underwriting (AALU), Society of Financial Service Professionals (FSP), Million Dollar Round Table (MDRT) Top of the Table, and others. He has also authored articles for the CPA Journal, the Journal of Financial Service Professionals, and many other industry periodicals.

Jeff is a Distinguished Military Graduate of The Canisius College of Buffalo, New York and earned a Bachelor of Science degree in Management with a minor in Accounting. He also holds FINRA Series 6 and 26 registrations and is a CFS® professional.

Concurrent Session: Tuesday, Feb. 7: Utilizing Annuities in Trusts



Marguerita (Rita) Cheng helps educate the public, policy makers, and media about the benefits of competent, ethical financial planning. The chief executive officer of financial advisory firm, Blue Ocean Global Wealth, Rita helps people meet their life goals through the proper management of financial resources. She is passionate about helping them navigate some of life's most difficult issues—divorce, death, career changes, caring for aging relatives—so they can feel confident and in control of their finances. She takes pride in her ability to make a difference in people's lives. Rita also volunteers her time as a SoleMate, or charity runner for Girls on the Run, raising money to win scholarships for girls.

Rita is a Certified Financial Planner® (CFP®) professional, a Chartered Retirement Planning Counselor®, Retirement Income Certified Professional®, and a Chartered SRI™ Counselor (CSRIC®). She is a member of the CNBC Financial Advisor Council. She is a regular columnist for Kiplinger & US News & World Report, and a past spokesperson for the AARP Financial Freedom Campaign. In addition, she serves as a Women's Initiative (WIN) Advocate and a member of the Diversity Advisory Group (DAG) for the CFP Board. In 2022, she was named the #4 Most Influential Financial Advisor in the Investopedia Top 100. She was named a "Woman to Watch" by Investment News in 2017.

Concurrent Session: Tuesday, Feb. 7: CFP® Ethics Course