

Value Investor Conference Agenda

valueinvestorconference.com

April 28 - 29, 2016
University of Nebraska at Omaha
College of Business Administration



Thursday, April 28, 2016

University of Nebraska at Omaha Mammel
Hall
(67th St. and Pine)

4:30 p.m. - 5:15 p.m.

Registration
Mammel Hall Atrium

4:30 p.m. - 6:00 p.m.

Conference Bookstore Open
Mammel Hall Atrium

5:30 p.m. - 5:35 p.m.

Robert Miles
Author, UNO Faculty, Host
Welcome

5:35 p.m. - 6:15 p.m.

Tom Gayner
Co-CEO, Markel Corp
"Drinks"



6:15 p.m. - 6:45 p.m.

Reception
New Location: Scott Conference Center
(6450 Pine St.)

6:45 p.m. - 7:15 p.m.

Dinner
Scott Conference Center

7:15 p.m. - 8:15 p.m.

Chuck Akre, Founder
CEO, CIO, Akre Capital Management
"What Are We After With Our Investment
Strategy?"

Friday, April 29, 2016

University of Nebraska at Omaha Mammel
Hall (67th St & Pine)

7:30 a.m. - 8:00 a.m.

Registration - Breakfast & Coffee
Mammel Hall Atrium

8:00 a.m. - 6:00 p.m.

Conference Bookstore Open
Mammel Hall Atrium

8:00 a.m. - 8:40 a.m.

Aswath Damodaran
Author, Professor, NYU
"Price or Value? What's Your Game?"

8:40 a.m. - 9:20 a.m.

Anna Nikolayevsky
Founder, CIO, Axel Capital Management
"Global Macro: Drinking Upstream From
the Herd"

9:20 a.m. - 9:40 a.m.

Break

9:40 a.m. - 10:20 a.m.

Brian Bares

CFA, Founder, CIO, Bares Capital
Management

“Finding an Edge: Creating a Moat Around
an Investment Process”

10:20 a.m. - 11:00 a.m.

Tren Griffin

Author, Senior Director, Microsoft

“Charlie Munger: Evolving Value Investing
Beyond Cigar Butts”

11:00 a.m. - 11:20 a.m.

Break

11:20 a.m. - 12:00 p.m.

Jeff Auxier

Founder, CEO, CIO, Auxier Asset
Management

“A Farmer’s Perspective on Stock Picking
Along the Food Value Chain”

12:00 p.m. - 1:00 p.m.

Lunch

Mammel Hall Atrium

1:00 p.m. - 1:40 p.m.

Fred Kiel

Author, Co-Founder, KWL International

“Return on Character: The Real Reason
Leaders and Their Companies Win”

1:40 p.m. - 2:20 p.m.

Rupal Bhansali

Executive Vice President and Chief
Investment Officer, Global Equities
Portfolio Manager Ariel Investments

“The Case for Contrarian Intrinsic Value
Investing”

2:20 p.m. - 2:40 p.m.

Break

2:40 p.m. - 3:20 p.m.

Michael van Biema

Author, Professor, Founder, Managing
Partner, van Biema Value Partners

AND

Allen Benello

CFA, Author, General Partner, White River
Partners

“Concentrated Investing: Strategies of
the World’s Greatest Concentrated Value
Investors”

3:20 p.m. - 4:20 p.m.

François Rochon

Founder, President, Portfolio Manager,
Giverny Capital [Canada]

“The Art of Investing”

4:20 p.m. - 4:40 p.m.

Break

4:40 p.m. - 5:40 p.m.

Charles Brandes

CFA, Founder and Chairman, Brandes
Investment Partners

Roger Lowenstein

Chairman, Sequoia Fund; Author

“A Conversation with Charles Brandes by
Roger Lowenstein”

5:40 p.m. - 5:45 p.m.

Robert Miles, Author, UNO Faculty, Host
Closing Remarks

Fall 2016

Genius of Warren Buffett Course

Sept. 29 - Oct. 1,

and Oct. 20 - 22, 2016

Join us in 2017! Register now and save!

14th Annual Value Investor Conference

May 4 - 5, 2017

Corporate Value Summit/Omaha Value Dinner

May 4, 2017

Genius of Warren Buffett Course

May 1, 2, and 3, 2017