



March 10, 2017

## What's Happening at CFA Cleveland?

March 15	<a href="#">Charles Smith, Oppenheimer SteelPath</a>
April 5	<a href="#">JD Gardner, Aptus Capital Advisors</a>
April 12	<a href="#">Andy Laperriere, Cornerstone Macro</a>
April 19	Vanguard, more details to follow
May 3	LaGuardia Reynolds & Associates, more details to follow
May 11	<a href="#">Night at Nuevo with Paul Smith, CEO CFA Institute</a>
May 31	<a href="#">Maddie Desser, JPMorgan</a>
June 7	<a href="#">Ivy Zelman, Zelman &amp; Associates</a>

### **Charles Anderson, Oppenheimer SteelPath, Senior Client Portfolio Manager, *MLP's: A Prospect for Growth and Income*, March 15, 2017**



### Luncheon Sponsored by Oppenheimer Funds



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### ***MLP's: A Prospect for Growth and Income***

Charles Anderson serves as a senior client portfolio manager covering the Oppenheimer SteelPath strategies. In this capacity, he is responsible for articulating the SteelPath Team vision and strategy specifics. Charles has been in the industry since 1998 and was previously with SteelPath Capital Management where he served as Regional Vice President. Charles also served in the same capacity with Janus Funds for 10 years. He has received his B.A. from University of Kansas.

[Register Here](#)

**JD Gardner, CFA, CMT, Aptus Capital Advisors LLC, *Behavior, Momentum, & ETFs*, April 5, 2017**



***Behavior, Momentum, & ETFs***

JD Gardner, CFA, CMT

JD attended the Raj Soin College of Business, Wright State University for both undergrad (BS in Business with a Major in Financial Services) and graduate degrees (MBA with a concentration in Finance). Founded Aptus in 2013 to provide access to stock market exposure while recognizing risk - both market and behavioral. Aptus is an innovative investment manager located in Fairhope, Alabama focused on behavioral finance and serves as the Index Provider to the Aptus Behavioral Momentum Index and adviser to the Aptus Behavioral Momentum ETF (Ticker:BEMO).

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