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POSITIONS/AFFILIATIONS

- 2016- Dean Takahashi '80 B.A., '83 M.P.P.M Professor of Finance, Yale University, Yale SOM
Courses taught: Applied Quantitative Finance (MBA, Ph.D.); Factor Investing (Exec. Ed.); The Investor (MBA); Sports Analytics (MBA, Undergrad)
- 2008-15 Fama Family Professor of Finance, University of Chicago, Booth School of Business
Courses taught: Investments (MBA); Investments I (Exec. Ed.); Real Estate (Exec. Ed.); Quantitative Investments (MBA); Empirical Asset Pricing (Ph.D.); Sports Analytics (MBA)
- 2015-16 Visiting Professor of Finance, Yale University, School of Management
- 2007- Research Associate, National Bureau of Economic Research
- 2007- Consultant and Principal, AQR Capital Management, LLC
- 2005-08 Professor of Finance and Neubauer Family Faculty Fellow, University of Chicago, Booth School of Business
- 2002-05 Associate Professor of Finance, University of Chicago, Booth School of Business
- 1998-02 Assistant Professor of Finance, University of Chicago, Booth School of Business

EDUCATION

- 1998 *Ph.D.* (Finance), UCLA Anderson School
- 1994 *M.S.* (Management), Purdue University Krannert Graduate School of Management
- 1993 *B.S.* (Industrial Engineering/Management) with Distinction, Purdue University

HONORS/AWARDS

Career Awards:

- 2012 Ewing Marion Kauffman Medal (top entrepreneurship research under age 40)
- 2011 UCLA Anderson School of Management 100 Most Inspirational Alumni
- 2010 John S. Day Distinguished Alumni Academic Service Award, Purdue University
- 2010 Purdue University 40 under 40 Most Outstanding Alumni
- 2007 Fischer Black Prize (top finance scholar under age 40)

Paper Prizes:

- 2016 Fama-DFA Prize for the Best Paper Published in the *Journal of Financial Economics* (“Momentum Crashes”)
- 2015 Bernstein/Fabozzi/Jacobs Levy Outstanding Article *Journal of Portfolio Management* (“Fact, Fiction, and Value Investing”)
- 2015 Harry Markowitz Prize, Special Distinction *Journal of Investment Management* (“Investing with Style”)
- 2015 Red Rock Finance Conference Best Paper Award (“Decision Making Under the Gambler’s Fallacy”)
- 2014 Financial Research Association Best Paper Award (“Asset Pricing and Sports Betting”)
- 2014 Swiss Finance Institute Outstanding Paper Award (“Momentum Crashes”)
- 2012 Whitebox Prize for the best financial research (“Time Series Momentum”)
- 2010 Q-Group Best Paper Award (“The Effects of Stock Lending on Security Prices: An Experiment”)
- 2007 Chookaszian Endowed Risk Management Prize (for the best paper on risk management) (“Catastrophic Risk and Credit Markets”)
- 2006 Brattle Prize (for the best Corporate Finance paper published in the *Journal of Finance*), Distinguished paper (“Testing Agency Theory with Entrepreneur Effort and Wealth”)
- 2005 Barclays Global Investors Michael Brennan Award for the best paper published in *Review of Financial Studies*, Second prize (“Informal Financial Networks: Theory and Evidence”)
- 2004 Barclays Global Investors Michael Brennan Award for the best paper published in *Review of Financial Studies*, First prize (“Confronting Information Asymmetries: Evidence from Real Estate Markets”)
- 2003 Q-Group Best Paper Award (“Market Frictions, Price Delay, and the Cross-Section of Expected Returns”)
- 2000 Smith-Breeden Prize (for the best paper published in the *Journal of Finance*), First prize (“Home Bias at Home: Local Equity Preference in Domestic Portfolios”)

PUBLICATIONS

- “Fact, Fiction, and the Size Effect,” 2018, (with Ron Alquist and Ronen Israel), *Journal of Portfolio Management* 45 (1), 3-30.
- “Size Matters, If You Control Your Junk,” 2018, (with Cliff Asness, Andrea Frazzini, Ronen Israel, and Lasse Pedersen), *Journal of Financial Economics* 129, 479-509.
- “Carry,” 2018, (with Ralph Koijen, Lasse Pedersen, and Evert Vrugt), *Journal of Financial Economics* Volume 127, Issue 2, February 2018, Pages 197-225 (lead article).
- “Decision Making Under the Gambler’s Fallacy: Evidence from Asylum Judges, Loan Officers, and Baseball Umpires,” 2016, (with Daniel Chen and Kelly Shue), *Quarterly Journal of Economics*, Vol. 131 (3), 1181-1242.

– Red Rock Finance Best Paper Award

- “Momentum Crashes,” 2016, (with Kent Daniel), *Journal of Financial Economics* Vol. 122 (2), 221-247.
 - Fama-DFA Prize for the Best Paper Published in the *Journal of Financial Economics* (second prize, 2016)
 - Swiss Finance Institute Outstanding Paper Award (2015)
- “Fact, Fiction, and Value Investing,” 2015, (with Clifford Asness, Andrea Frazzini, and Ronen Israel), *The Journal of Portfolio Management*, 42 (1) 34-52.
 - Bernstein/Fabozzi/Jacobs Levy Outstanding Article
- “Fact, Fiction, and Momentum Investing,” 2015, (with Clifford Asness, Andrea Frazzini, and Ronen Israel), *The Journal of Portfolio Management*, 40th Anniversary Issue, Vol. 40, No. 5: 75-92.
- “Investing with Style,” 2015, (with Clifford Asness, Antti Ilmanen, and Ronen Israel), *Journal of Investment Management* Vol. 13, Issue 1, 27-63.
 - Harry Markowitz Prize, Special Distinction Award
- “Value and Momentum Everywhere,” 2013, (with Clifford Asness and Lasse Pedersen), *Journal of Finance* Volume 68, Issue 3, 929-985.
 - Finalist, 2013 Smith-Breeden Prize for the Best Paper Published in the *Journal of Finance*
- “The Effects of Stock Lending on Security Prices: An Experiment,” 2013, (with Steve Kaplan and Berk Sensoy), *Journal of Finance* Volume 68, Issue 5, 1891-1936.
 - Finalist, 2013 Smith-Breeden Prize for the Best Paper Published in the *Journal of Finance*.
 - Best Research Paper Award, Q-Group (First Prize, 2010)
- “The Role of Shorting, Firm Size, and Time on Market Anomalies,” 2013, (with Ronen Israel), *Journal of Financial Economics* Volume 108, Issue 2, 275-301.
- “Time Series Momentum,” 2012, (with Yao Hua Ooi and Lasse Pedersen) *Journal of Financial Economics* 104, 228-250.
 - Whitebox paper prize for the best financial research (2013)
- “The Political Economy of Financial Regulation: Evidence from U.S. State Usury Laws in the 19th Century,” 2010, (with Efraim Benmelech) *Journal of Finance*, Vol. 65, No. 3, 1029-1073.
- “Momentum Investing: Finally Accessible for Individual Investors,” 2010, *Investments and Wealth Monitor*, July/August edition.

- “Long-Run Stockholder Consumption Risk and Asset Returns,” 2009, (with Christopher Malloy and Annette Vissing-Jørgensen), *Journal of Finance*, Vol. 64, No. 6, 2427-2479.
 - Finalist, 2011 Smith-Breeden Prize for the Best Paper Published in the *Journal of Finance*.
- “Catastrophic Risk and Credit Markets,” 2007, (with Mark Garmaise), *Journal of Finance*, Vol. 64 No. 2, 657-707.
 - Chookaszian Endowed Risk Management Prize (2007)
- “Bank Mergers and Crime: The Real and Social Effects of Bank Competition,” 2006, (with Mark Garmaise), *Journal of Finance*, Vol. 61 No. 2.
- “Do Liquidation Values Affect Financial Contracts? Evidence from Commercial Loan Contracts and Zoning Regulation,” 2005, (with Mark Garmaise and Efraim Benmelech), *Quarterly Journal of Economics*, Vol. 120 No. 3, 1121-1154.
- “Market Frictions, Price Delay, and the Cross-Section of Expected Returns,” 2005, (with Kewei Hou), *Review of Financial Studies*, Vol. 18 No. 3, 981-1020.
 - Q-Group Research Grant Award (2003)
- “Testing Agency Theory With Entrepreneur Effort and Wealth,” 2005, (with Marianne Bitler and Annette Vissing-Jørgensen), Vol. 60 No. 2, 539-576.
 - Brattle Prize for the Best Corporate Finance Paper Published in the *Journal of Finance* (Distinguished paper prize 2005)
- “Confronting Information Asymmetries: Evidence from Real Estate Markets,” 2004, (with Mark Garmaise), *Review of Financial Studies*, Vol. 17 No. 2, 405-437.
 - Barclays Global Investors Michael Brennan Award for the Best Paper Published in the *Review of Financial Studies* (second prize 2004)
- “Predicting Stock Price Movements from Past Returns: The Role of Consistency and Tax-Loss Selling,” 2004, (with Mark Grinblatt), *Journal of Financial Economics* Vol. 71 No. 3, 541-579.
- “Informal Financial Networks: Theory and Evidence,” 2003, (with Mark Garmaise), *Review of Financial Studies*, Vol. 16 No. 4, 1007-1040.
 - Barclays Global Investors Michael Brennan Award for the Best Paper Published in the *Review of Financial Studies* (First prize, 2004)
- “An Analysis of Covariance Risk and Pricing Anomalies,” 2003, *Review of Financial Studies*, Vol. 16 No. 2, 417-457.

- “The Returns to Entrepreneurial Investment: A Private Equity Premium Puzzle?” 2002, (with Annette Vissing-Jørgensen), *American Economic Review*, Vol. 92 No. 4, 745-778.
- “The Geography of Investment: Informed Trading and Asset Prices,” 2001, (with Joshua Coval), *Journal of Political Economy* Vol. 109 No. 4, 811-841.
- “Discussion of Mutual Fund Performance: An Empirical Decomposition into Stock-Picking Talent, Style, Transactions Costs, and Expenses,” 2000, *Journal of Finance*, 55, 1695-1704.
- “Home Bias at Home: Local Equity Preference in Domestic Portfolios,” 1999, (with Joshua Coval), *Journal of Finance*, 54, 2045-2074.
 - Smith-Breeden Award for the Best Paper Published in the *Journal of Finance* (First prize, 2000)
- “Do Industries Explain Momentum?” 1999, (with Mark Grinblatt), *Journal of Finance*, 54, 1249-1290.

WORKING PAPERS

1. “Trading Costs,” 2018, (with Andrea Frazzini and Ronen Israel), Yale University working paper.
2. “Trading Costs of Asset Pricing Anomalies,” 2017, (with Andrea Frazzini and Ronen Israel), Yale University working paper.
3. “Fake News: Evidence from Financial Markets,” 2018, (with Marina Niessner and Shimon Kogan).
4. “Asset Pricing and Sports Betting,” 2018, Yale University working paper.
5. “Yield Curve Premia,” 2018, (with Jordan Brooks), Yale University working paper.
6. “Factor Premia and Factor Timing: A Century of Evidence,” 2018, (with Antti Ilmanen, Ronen Israel, Ashwin Thapar, and Franklin Wang), Yale University working paper.
7. “Mispricing Premia,” 2018, (with Todd Hazelkorn and Kaushik Vasudevan).
8. “Implementing Momentum: What Have We Learned?” 2018, (with Adrienne Ross, Laura Serban, and Ronen Israel).
9. “Gross Flows,” 2018, (with Gregor Matvos), Yale University working paper.
10. “Crowding,” 2019, (with Sarah Jiang and Ron Alquist), Yale University working paper.
11. “Diversification,” 2019, (with Cliff Asness and Lei Xie).

12. “Avoiding Terminal Decisions,” 2019 (with Kaushik Vasudevan).
13. “Understanding Momentum and Reversals,” 2018, (with Bryan Kelly and Seth Pruitt), Yale University working paper.
14. “A Unified Framework for Value and Momentum,” 2019, (with Jakob Boudoukh and Matthew Richardson), Yale University working paper.
15. “Who is on the Other Side?”, 2019, (with Cliff Asness, Antti Ilmanen, Lukasz Pomorski, and Lei Xie), Yale University working paper.
16. “How Tax Efficient are Equity Styles?” 2014, (with Ronen Israel), Yale University working paper.

BOOKS

- 2011 “SCORECASTING: THE HIDDEN INFLUENCES BEHIND HOW SPORTS ARE PLAYED AND GAMES ARE WON”, 2011, (with L. Jon Wertheim), Crown Archetype and Three Rivers Press, Random House (**New York Times* Bestseller)

Featured in Sports Illustrated, New York Times, Wall Street Journal, Economist, Financial Times, Forbes, LA Times, Chicago Tribune, Boston Globe, Bloomberg

Featured on CNN, MSNBC, CNBC, HBO Sports, ABC, CBS, Bloomberg, NFL Network, ESPN, Freakonomics podcast, NPR

- 2014 “THE ROOKIE BOOKIE”, 2014, (with L. Jon Wertheim), Little Brown.

Mathical List Honorable Mention (from the Mathematical Sciences Research Institute).

3rd Place SCASL Children’s Book Banner contest.

- 2017 “THE FAMA PORTFOLIO”, 2017, (edited by John Cochrane and Tobias J. Moskowitz), University of Chicago Press.

RESEARCH INTERESTS

Asset Pricing

Risk Sharing

Real Estate Markets

Quantitative Investment

Portfolio Choice

Market Efficiency

Empirical Corporate Finance

Sports Analytics and Business

DOCTORAL STUDENT SUPERVISION

C = CHAIR (PLACEMENT)

- 2018 Kaushik Vasudevan (C), Sharon Yin (C), Chase Ross, Yukun Liu (C)
2017 Sharon Yin (C), Steve Fortney (C), Kyriakos Chousakos (C)
2016 John Shim (C), Jun Wu
2015 Xiao Qiao(C)
2014 Mark Egan (Harvard), Wei Wu(C), Gilbert Park, Chattrin Laksanabunsong(C)
2013 Santosh Srihari (C, Maryland), Filipe Lacerda (Cornerstone)
2012 Marina Niessner (C, Yale), Brian Weller (C, Northwestern), Timothy Dore (Fed)
Teresa Sonka-Lwin (C, Finance), Andrius Staisiunus (C, Finance)
2011 Savina Rizova (C, DFA), Mathias Kronlund (U. of Illinois)
2010 Roni Kisin (Wash. U.)
2009 Marlena Lee (DFA)
2008 Raife Giovannazo (C, Fuller-Thaler), Itzhak Ben-David (C, Ohio State),
Brian Melzer (C, Northwestern)
2007 Nicolai Roussanov (Wharton)
2006 Berk Sensoy (Ohio State), Lukasz Pomorski (C, Toronto)
2005 Lauren Cohen (C, Harvard), Efraim Benmelech (Northwestern), Stephanie Curcuru (Fed BoG)
2004 Henrik Cronqvist (Ohio State), Lan Shi (U. of Wash.), Frank Zhang (Yale)
2003 Christopher Malloy (Harvard), Karl Diether (Dartmouth), Aaron Lebovitz (Finance)
2002 Jeffrey Meli (Finance), Xia Chen (Accounting)
2001 Kewei Hou (C, Ohio State), Ilan Cooper (Norway)
2000 Peter Hecht (AQR), Reto Bachman (Oslo)
1999 Yubo Wang (Goldman Sachs), Arthur Kraft (Rochester)

FELLOWSHIPS/GRANTS

- 2016 Dean Takahashi Chaired Professorship
2008 Fama Family Chaired Professorship
2005 Neubauer Family Faculty Fellowship
2002 James S. Kemper Foundation Scholar
1999 Dimensional Fund Advisors Scholar
1996 Anderson Fellowship
1994 Krannert Scholar (Most Outstanding Student)
1993 Phi Beta Kappa, Beta Gamma Sigma, Omega Rho, Phi Kappa Phi, Golden Key
1990 Peterson-Lawrence Fellowship

OTHER PROFESSIONAL APPOINTMENTS

2013-	Associate editor, <i>Critical Finance Review</i>
2008-2011	Board of Directors, American Finance Association (elected)
2011-	Board of Directors, Fama-Miller Financial Center
2008-2012	Associate Editor, <i>Journal of Finance</i>
2007	Lehman Brothers Dissertation Fellowship Judge
2007-	Board of Directors, Initiative on Global Markets
2005-	Board of Directors, Center for Research in Security Prices
2005-2008	Editor, <i>Review of Financial Studies</i>
2005-2008	Board of Directors, Western Finance Association and SFS
2006, 2010, 2011	Nominating committee for AFA
2001-2003	Associate Program Director, Western Finance Association Meetings
2005-	Founding Program member, FRA
2002-	Program Committee and Session Chair, Western Finance Association Meetings
2002-2003, 2005	Program Committee and Session Chair, American Finance Association Meetings
2003, 2011	Program Organizer and Session Chair, NBER Asset Pricing Meetings
2002	Program Organizer and Session Chair, NBER Asset Markets and Real Estate Summer Institute Meetings
1997-	Member: NBER, American Finance Association, Western Finance Association, American Economic Association
1997-	Referee for the <i>Journal of Finance</i> , <i>Review of Financial Studies</i> , <i>Journal of Financial Economics</i> , <i>Journal of Political Economy</i> , <i>Journal of Business</i> , <i>Quarterly Journal of Economics</i> , <i>American Economic Review</i> , <i>Journal of International Economics</i> , <i>International Review of Economics and Finance</i>

INVITED PRESENTATIONS

Academic Conferences

- 2018 American Finance Association, (discussion and presentation), Philadelphia, PA
Red Rock Finance Conference – keynote
Swedish House of Finance and Stockholm School of Economics
Copenhagen Business School
Aalto University
University of Maryland
Federal Reserve Bank of New York
SFS Cavalcade, Yale University
- 2017 NBER Asset Pricing Summer Institute (presenter), Boston, MA
NBER Behavioral Finance meetings, Chicago, IL
American Finance Association, (discussion and presentation), Chicago, IL
Five Star Conference, NYU
- 2016 NBER Asset Pricing Summer Institute (discussion), Boston, MA
American Finance Association, (discussion and presentation), San Francisco, CA
Q-Group 50th Anniversary, Washington D.C.
Uhlenbruch 19th Annual Portfolio Management Conference, Frankfurt, Germany – keynote speaker
AQR University and AQR Forum, Chicago, IL
Hedge Fund conference, Washington University at St. Louis
London Business School
London School of Economics
- 2015 American Finance Association, (discussion and presentation), Boston, MA
World Investment Forum, FTSE, speaker, Newport Beach, CA
- 2014 American Finance Association, (presentation), Philadelphia, PA
NBER Corporate Finance meetings Summer Institute, Boston, MA
NBER Behavioral Economics meetings, Cambridge, MA
Institutional Investment conference, NYC, NY
Q-Group conference, CA
Institutional Investment conference, San Francisco, CA
Oxford University, Oxford, UK
Swiss Finance Institute
Financial Research Association Conference, Las Vegas, NV
- 2013 American Finance Association, (presentation, discussion), San Diego, CA
NBER Asset Pricing meetings, Boston, MA
AQR University, Chicago, IL
World Investment Forum, FTSE, Keynote speaker, Napa Valley, CA
- 2012 American Finance Association, (presentation, discussion, session chair), Chicago, IL
Finance Down Under, Keynote speaker, Melbourne, Australia
World Investment Forum, FTSE, Keynote speaker, Sea Island, GA
AQR University, Harvard University, Cambridge, MA
NBER Asset Pricing Summer Institute, (paper presentation) Cambridge, MA
UBC Summer Finance Conference, Vancouver, B.C. Canada

Academic Conferences (cont.)

- 2011 American Finance Association, (two presentations and discussion), Denver, CO
Wharton Conference in Honor of Marshall Blume, (presentation), Philadelphia, PA
NBER Asset Pricing Summer Institute, (organizer) Cambridge, MA
- 2010 American Finance Association, (presentation and discussion), Atlanta, GA
SIFR Conference on Asset Pricing (keynote speech and paper presentation), Stockholm, Sweden
- 2009 American Finance Association, (presentation and discussion), San Francisco, CA
- 2008 American Finance Association, (presentation and discussion), New Orleans, LA
- 2007 American Finance Association (presentation, discussion), Chicago, IL
NBER Asset Pricing Summer Institute, (presentation) Cambridge, MA
- 2006 American Economic and Finance Association (presentation, discussion, chair), Boston, MA
NBER Corporate Finance, Spring meetings, Chicago, IL
NBER Political Economy, Summer Institute meetings, Cambridge, MA
Conference on Bank Structure and Competition at the Chicago Federal Reserve
FRA, (discussion) Las Vegas, NV
- 2005 Inquire Europe Conference on Behavioral Finance, *Keynote Speaker, Prague, Czech Republic
American Economic and Finance Association (presentation and discussion), Philadelphia, PA
NBER Asset Pricing Summer Institute, (presentation)
- 2004 American Economic Association, Jan. 2004, San Diego, CA
Western Finance Association (session chair), Vancouver, CA
NBER Asset Pricing Summer Institute, (discussion)
SIFR Conference on Portfolio Choice, Stockholm, Sweden
- 2003 NBER Entrepreneurship Meetings
Western Finance Association (session chair), Cabo, MX
- 2002 American Finance Association (discussion), Atlanta, GA
NBER Asset Pricing Meetings, (discussion)
NBER Public Policy and Real Estate Summer Institute, (discussion)
- 2001 American Finance Association (discussion), January 2001, New Orleans, LA
Berkeley Program in Finance, Lake Tahoe, CA
Texas Finance Festival (presentation), San Antonio, TX
Western Finance Association (presentation and discussion), Tucson, AZ
NBER Asset Markets and Real Estate Summer Institute, Boston, MA
- 2000 American Finance Association (presentation and discussion), Boston, MA
Western Finance Association, Sun Valley, ID
NBER Public Policy and Real Estate Summer Institute, Boston, MA
Econometric Society, Seattle, WA
- 1999 American Finance Association, New York, NY
Western Finance Association (discussion), Santa Monica, CA
- 1998 UCLA Behavioral Finance Conference (discussion), Los Angeles, CA
Western Finance Association, June 1998, Monterey, CA
NBER Asset Pricing Conference, October 1998, Chicago, IL

Academic Seminars

- 2018 Maryland, Stockholm School of Economics, Copenhagen Business School, Aalto, NY Fed
Oxford University
- 2017 NYU, Stockholm School of Economics, Copenhagen Business School,
Oxford University
- 2016 London School of Economics, London Business School
- 2015 Dartmouth, University of Texas, Yale
- 2014 Oxford University, Chicago, University of Zurich, University of Geneva, University of Lugano
- 2013 Boston College, University of Texas at Austin, Michigan
- 2012 UCLA, Harvard, Michigan, Stanford, Berkeley
- 2011 Chicago, Washington University
- 2010 Chicago, Emory, SIFR Conference, Wharton, Q-Group
- 2009 Duke, Chicago, LBS, LSE, Stockholm School of Economics, SIFR
- 2008 NYU, Yale, University of Chicago, Princeton
- 2007 University of Chicago, Harvard, Federal Reserve in Chicago
- 2006 Harvard Economics, University of Chicago, University of Texas at Austin,
Northwestern University, Cornell University
- 2005 Princeton, Ohio State, University of Illinois, University of Chicago, INSEAD,
London Business School, London School of Economics
- 2004 Indiana, Dartmouth, University of Washington, Stockholm School of Economics
- 2003 UCLA, Wharton, NYU, Stockholm School of Economics, Rice
- 2002 UCLA, USC, Rochester, Columbia, Notre Dame, University of Texas (Dallas)
- 2001 Stockholm School of Economics, Ohio State, Wisconsin (Milwaukee),
University of British Columbia, Harvard Business School, Chicago
- 2000 Maryland University, University of Illinois at Urbana-Champaign, Wharton,
Wisconsin (Madison), UCLA, Arizona State, Stanford, Berkeley, McGill
- 1999 University of Chicago, Purdue
- 1998 UCLA, Yale, Harvard (business), MIT (Sloan), Rochester, Ohio State, Wharton,
Columbia, Duke, University of Colorado at Boulder, University of Texas at Austin,
University of Chicago, Northwestern, Michigan

Practitioner Conferences

- 2018 AQR University, Forum, Symposium, Merrill Lynch, Morgan Stanley, Institutional Investor conference, NYC, NY
ABA Wealth Management Conference, Orlando, FL
- 2017 AQR University, Forum, Symposium, Merrill Lynch, Morgan Stanley, Institutional Investor conference, NYC, NY
- 2016 AQR University, Forum, Symposium, Merrill Lynch, Morgan Stanley, BAM conference, Symmetry conference, ABA Wealth Management conference, Fidelity Fiduciary Investors Symposium, Yale University, ABA Wealth Management Conference, Deutsche Bank Institutional Investor conference, Barrons Investment Conference, Orlando, FL
- 2015 AQR University, Forum, Symposium, Merrill Lynch, Morgan Stanley, Charles Schwab, BAM conference, Symmetry conference
- 2014 Barron's (2x), Institutional Investors (2x), JP Morgan/Chase conference, NYC, NY, Symmetry Focus Forum, BAM annual conference, Albourne Hedge Fund conference, AQR Symposium, AQR University,
- 2013 RBC Wealth Management Conference, Toronto CA
US Trust Family Wealth Conference, Chicago, IL
IALF presentation
Rush Medical Center Investment Committee presentation
iShares, US Trust Family Conference, Chicago, IL (*Key note speaker)
- 2012 CPWA, IMCA, FTSE World Investment Forum, Huron Capital, AQR University, CPWA Annual Conference, Washington D.C.
- 2011 Morgan Stanley Family Wealth Conference, Phoenix, AZ. (*Key note speaker), Centerview Partners, Scottsdale, AZ (*Key note speaker), iShares, US Trust Family Conference, Chicago, IL (*Key note speaker), AQR University, Palo Alto, CA
- 2010 US Trust Family Conference, Chicago, IL. (*Key note speaker), iShares, US Trust Family Conference, Chicago, IL (*Key note speaker), Morgan Stanley Family Wealth Conference, Phoenix, AZ, Q-Group conference, FL
- 2009 Northern Trust conference, 2009, Chicago, IL, IMCA Annual conference, Chicago, IL (*Key note speaker)
- 2008 William Blair Family Wealth Conference, Chicago, IL, Terrapin Hedge Fund conference, New York, NY
- 2007 William Blair Family Wealth Conference, Chicago, IL, Merrill Lynch Top Advisor Conference
- 2004 Inquire Europe, European Institute, Prague, Czech Republic (*Key note speaker)
- 1999 Morningstar Annual Conference, Chicago, IL, Undiscovered Managers, Chicago, IL

OUTSIDE RELATIONSHIPS

2015- Principal, AQR Capital, LLC, Greenwich, CT
2012-15 Board of Directors Ariel Capital Management, Chicago, IL
2009-14 Board of Directors Akiba-Schechter Jewish Day School
2008- Research Consultant to AQR Capital, LLC Greenwich, CT
2004- AIM Holding Company, LLC (includes MetroStocks, StockPulse)
2005-06 Mercer Global Advisors (advisory board)