

THE 2ND ANNUAL NEW YORK VALUE INVESTING CONGRESS

November 9 & 10, 2006 • New York, NY



THURSDAY

November 9

7:45–8:45 AM

Registration & Continental Breakfast

8:45–9:00 AM

Welcoming Remarks

John L. Schwartz & Whitney Tilson
Schwartz Tilson Information

9:00–9:40 AM

You'll Be Interested In This

William Ackman, *Pershing Square*

9:40–10:20 AM

Opportunities in Financial Services

Thomas K. Brown, *Second Curve Capital*

10:20–11:00 AM: Refreshment Break

11:00–11:40 AM

The Bull Market in Time Arbitrage

Joel Greenblatt, *Gotham Capital*

11:40 AM–12:20 PM

The Adaptive Value Investor

Lisa Rapuano, *Lane Five Capital Mgmt.*

12:20–1:40 PM: Lunch (on your own)

1:40–2:20 PM

Global Value Investing

Christopher Browne, *Tweedy Browne Company, LLC*

2:20–3:00 PM

Dhando! Low Risk + High Uncertainty = Ultra High Rewards

Mohnish Pabrai, *Pabrai Investment Funds*

3:00–3:40 PM: Refreshment Break, Sponsored by Altegris

3:40–4:20 PM

How Fraudsters Deceive Wall Street and the American Public

Barry Minkow, *The Fraud Discovery Institute*

4:20–5:00 PM

Opportunities for 2007

Larry Robbins, *Glenview Capital*

5:00–6:30 PM

Welcome Reception

FRIDAY

November 10

7:45–8:45 AM

Registration & Continental Breakfast

8:45–9:00 AM

Welcoming Remarks

John L. Schwartz & Whitney Tilson
Schwartz Tilson Information

9:00–9:40 AM

Value...or Value Trap?

James Chanos, *Kynicos Associates*

9:40–10:20 AM

The Next Written Buffet

Bruce Berkowitz, *Fairholme Capital Mgmt.*

10:20–11:00 AM: Refreshment Break

11:00–11:40 AM

The Barbarian at the Gate is Often More Creative than the Gatekeeper

Guy Wyser-Pratte, *Wyser-Pratte Mgmt.*

11:40 AM–12:20 PM

Think Like Main Street, Not Wall Street

Curtis Jensen & Amit Wadhwaney, *Third Avenue Mgmt.*

12:20–1:50 PM: Lunch (on your own)

1:50–2:30 PM

And I Thought Running a Hedge Fund was Cool

David Einhorn, *Greenlight Capital*

2:30–3:10 PM

Scuttlebutt Research — Investing with Conviction

Kian Ghazi, *Hawkshaw Capital Mgmt.*

3:10–3:50 PM

The Little Stock that Beats the Market

Whitney Tilson & Glenn Tongue, *T2 Partners, LLC*

3:50–4:00 PM

Wrap-Up and Farewell