



# THE 2<sup>ND</sup> ANNUAL VALUE INVESTING CONGRESS WEST

May 8 & 9, 2007 • Hollywood, CA

## TUESDAY

May 8

**7:30–8:30 AM**

**Registration & Breakfast**

**8:30–8:45 AM**

**Opening Remarks**

John L. Schwartz & Whitney Tilson,  
*Schwartz Tilson Information*

**8:45–9:30 AM**

**The Dhandho Investor: Abhimanyu's Dilemma**

Mohnish Pabrai, *Pabrai Investment Funds*

**9:30–10:15 AM**

**Entrepreneurial Investing**

Lance Helfert & Atticus Lowe, *West Coast Asset Management*

**10:15–10:30 AM: Morning Break**

**10:30–11:15 AM**

**My Favorite Stock**

Mark Sellers, *Sellers Capital Fund*

**11:15 AM–12:00 PM**

**Dau Tu Khong Truoc Khi Thong Thuong**

Carlo Cannell, *Cannell Capital*

**12:00–1:15 PM: Lunch**

**1:15–2:00 PM**

**With Friends Like These... Management Matters**

Wally Weitz, *Weitz Funds*

**2:00–2:45 PM**

**Accountability: An Activist Investor's Ally**

Michael McConnell, *Shamrock Capital Advisors*

**2:45–3:30 PM**

**Leverage (Cheap Options) for the Value Investor**

Douglas W. Grey, *Saddle Peak Asset Management*

**3:30–3:45 PM: Afternoon Break**

**3:45–4:30 PM**

**How Concentrated Should You Be?: Examining the Big Bet Theory**

Zeke Ashton, *Centaur Capital Partners*

**4:30–5:15 PM**

**Global Value Equity Investing**

Thomas Russo, *Gardner Russo & Gardner*

**5:15–6:45 PM**

**Cocktail Reception**

## WEDNESDAY

May 9

**7:30–8:30 AM**

**Registration and Breakfast**

**8:30–8:45 AM**

**Welcoming Remarks**

Whitney Tilson & John L. Schwartz,  
*Schwartz Tilson Information*

**8:45–9:30 AM**

**Growth Investing in a Value Based World**

Robert Hagstrom, *Legg Mason Capital Management*

**9:30–10:15 AM**

**The Virtue of Patient Investing**

Steven Romick & Robert Rodriguez, *First Pacific Advisors*

**10:15–10:30 AM: Morning Break**

**10:30–11:15 AM**

**Finding Value Off the Beaten Path**

Bill Vlahos, *Odyssey Value Advisors*

**11:15 AM–12:00 PM**

**Opportunities in Corporate Spin-Offs and Breakups**

Whitney Tilson and Glenn Tongue, *T2 Partners*

**12:00–12:15 PM**

**Closing Remarks**