

AGENDA

3RD ANNUAL VALUE INVESTING CONGRESS WEST

May 6 & 7, 2008 • Pasadena, CA

TUESDAY, May 6

7:00 – 8:00 AM

Registration and Continental Breakfast

8:00 – 8:15 AM

Opening Remarks

John L. Schwartz & Whitney Tilson

Schwartz Tilson Information

8:15 – 9:00 AM

Paving the Yellow Brick Road

Mark Sellers, *Sellers Capital Fund*

9:00 – 9:45 AM

The Whites of My Eyes: Current Thoughts in Value

Jeff Bronchick, *Reed Conner & Birdwell, LLC*

9:45 – 10:15 AM: MORNING BREAK

10:15 – 11:00 AM

Active Value Investing:

Making Money in Range-Bound Markets

Vitaliy N. Katsenelson

Investment Management Associates

11:00 – 11:45 AM

Fishing for Value

Atticus Lowe & Lance Helfert

West Coast Asset Management

11:45 – 1:15 PM: LUNCHEON

1:15 – 2:00 PM

More Confessions of a Value Investing Heretic

Zeke Ashton, *Centaur Capital Partners*

2:00 – 2:45 PM

The Value of Timing

Randall Abramson, *Trapeze Asset Management*

2:45 – 3:15 PM: AFTERNOON BREAK

3:15 – 4:00 PM

Good Ideas for a Bad Market

Kenneth Shubin Stein, *Spencer Capital Management*

4:00 – 4:45 PM

From Financial Panic to Large Cap Growth Heaven

Robert Hagstrom, *Legg Mason Growth Trust*

4:45 – 5:30 PM

Alustra Woven Textiles, MV Petroleo Nautipa
and Moo Goo Gai Pan

J. Carlo Cannell, *Cannell Capital, LLC*

5:30 – 7:00 PM

Networking Reception

Outside in the Horseshoe Garden

WEDNESDAY, May 7

7:30 – 8:00 AM

Registration and Continental Breakfast

8:00 – 8:15 AM

Opening Remarks

Whitney Tilson & John L. Schwartz

Schwartz Tilson Information

8:15 – 9:00 AM

The Latest on the Mortgage Crisis and Implications
for Certain Financial Stocks

Whitney Tilson & Glenn Tongue, *T2 Partners*

9:00 – 9:45 AM

Finding Uncommon Value in Small Cap Stocks

Aaron Edelheit, *Sabre Value Management*

9:45 – 10:15 AM: MORNING BREAK

10:15 – 11:00 AM

Dhandho: Making Low-risk; High-uncertainty Bets

Mohnish Pabrai, *Pabrai Investment Funds*

11:00 – 11:45 AM

The Raw Deal

Steven Romick, *First Pacific Advisors*

11:45 – 12:00 PM

Closing Remarks

12:15 PM

WESCO shuttle bus departs

5:45 PM (approx.)

WESCO shuttle bus returns to The Langham

