

# CONGRESS

# AGENDA

MAY 5, 2009  
TUESDAY

7:00 - 8:00 AM

**Registration and Continental Breakfast**

8:00 - 8:15 AM

**Welcoming Remarks**

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

8:15 - 9:00 AM

**Not Dead Yet: Surviving Today to Triumph Tomorrow**

David Nierenberg, *D3 Family of Funds*

9:00 - 9:45 AM

**Banks: Have We Seen the Worst of It?**

David Chu & Igor Lotsvin, *Soma Asset Management*

9:45 - 10:15 AM | REFRESHMENT BREAK

10:15 - 11:00 AM

**A Cautious and Opportunistic Approach to Global Investing: Where Are We Finding Value Opportunities in the World Today?**

Charles de Vaulx, *International Value Advisers*

11:00 - 11:45 AM

**Surviving the Worst Case:**

**Risk Management and Value Investing**

Zeke Ashton, *Centaur Capital Partners*

11:45 AM - 1:00 PM | LUNCH

1:00 - 1:45 PM

**Low Risk Bets in a Risky World**

Brian Gaines, *Springhouse Capital*

1:45 - 2:30 PM

**China and the U.S. Dollar:**

**"Should We See Other People?"**

John H. Burbank III, *Passport Capital*

2:30 - 3:00 PM | REFRESHMENT BREAK

3:00 - 3:45 PM

**Investing in Global Education – From China to Brazil**

Guy Spier, *Aquamarine Capital Management*

3:45 - 4:30 PM

**Stock-picking for the Scared and the Ignorant:**

**Notes from an Expert**

David Rabinowitz, *Kirkwood Capital*

4:30 - 5:15 PM

**In Search of Pricing Power**

Jed Nussdorf, *Soapstone Capital*

5:15 - 7:00 PM

**Networking Cocktail Reception**

Horseshoe Garden

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**The U.S. Banking Sector: Chaos & Opportunity**

William C. Waller & Jason A. Stock, *M3 Funds*

9:00 - 9:45 AM

**Opportunities in Stressed and Distressed Credit**

Scott Klein, *Beach Point Capital Management*

9:45 - 10:15 AM | REFRESHMENT BREAK

10:15 - 11:00 AM

**Hydrodamalis Gigas**

J. Carlo Cannell, *Cannell Capital*

11:00 - 11:45 AM

**An Update on the Mortgage Crisis and a Discussion of Wells Fargo**

Whitney Tilson & Glenn Tongue, *T2 Partners*

11:45 AM - 12:00 PM

**Wrap-Up and Farewell**

12:15 PM

**Shuttle Bus to Wesco Annual Meeting**

