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SFBTA 2024
CONFERENCE
BOCA RATON | FEB 6-8

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Welcome to the 2014 South Florida Bond Traders Association Conference!

While you are here, you will have the opportunity to participate in our product-specific sessions, discuss current issues facing our industry, and network with other fixed income professionals from around the country. We will be kicking things off with a dinner Thursday evening, and begin our product-specific sessions Friday morning. Friday afternoon has been left open for you to spend as you wish, whether networking with customers and attendees, or enjoying the resort amenities. We will come back together Friday night for a cocktail reception on "Sponsor Street" and then head to our product-specific dinners. Saturday morning is dedicated to our golf, fishing, and tennis tournaments.

A mission of the SFBTA is to offer financial assistance to educational and charitable organizations in the South Florida area. Our goal is to give back to local charities in our community, and you are helping us achieve this goal! A portion of this year's conference proceeds will be donated to:

***Angel's Pediatric Heart House
HelpHOPELive
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Place of Hope at The Haven Campus***

I would like to thank our 2014 SFBTA Corporate Partners Amherst Securities Group, BNY Mellon, Incapital, JVB Financial Group, Mesirrow Financial, and Multi-Bank Securities for supporting our organization throughout the year. This conference could not happen without the generous support of our sponsors, especially our Premier Sponsor, BNP Paribas. Please be sure to visit the display tables on our "Sponsor Street" to learn more about conference sponsors supporting this event.

I would also like to thank our Conference Coordinators, along with some of our SFBTA Directors, who planned our sessions, dinners, and activities:

- **Vince Butkevits - JVB Financial Group, LLC**
- **Mark DeCosmo - Incapital LLC**
- **Eddie Deeb - Incapital LLC**
- **Mike Drake - Multi-Bank Securities, Inc.**
- **Rob Fairbrother - TMC Bonds LLC**
- **Jaime Hogan - JVB Financial Group, LLC**
- **Patrick Leary - Incapital LLC**
- **Glenn Lotenberg - Incapital LLC**
- **Nancy Ludwig - Incapital LLC**
- **Suzanne O'Connell - JVB Financial Group, LLC**
- **Jim Powell - Multi-Bank Securities, Inc.**
- **Lori Terrazi - Incapital LLC**
- **John Tessar - JVB Financial Group, LLC**
- **Amit Tirosh - Incapital LLC**

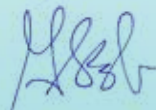
Lastly, I would like to give special recognition to our Conference Leadership Team, whose hard work and planning helped to ensure a successful event for all of us:

- **Krista Martin - Multi-Bank Securities, Inc.**
- **Jaime Hogan - JVB Financial Group, LLC**
- **Karen Antonucci - KA Marketing Solutions**

I am thankful the local South Florida fixed income community has come together once again to host our clients, create a dialogue about the current environment in our industry, and give back to the community.



All the Best,



George Barbar

President, SFBTA

Senior Managing Director, Mesirrow Financial

George@SouthFloridaBondTraders.org



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AGENDA

when

what

where

Thursday, February 6, 2014

12:00 pm - 6:00 pm Registration
 7:00 pm Cocktail Reception
 8:00 pm Welcome Dinner

Mizner Center
 Garden Pool
 Garden Pool

Friday, February 7, 2014

All activities will be held at the Mizner Center

8:00 am - 1:00 pm Registration

Mizner Center

8:00 am Continental Breakfast
 9:00 am Welcome
 Economic Update
 Keynote Address

George Barbar, President, South Florida Bond Traders Association
 Carl R. Tannenbaum, SVP/Chief Economist, Northern Trust
 Tom Ricketts, Chairman, Chicago Cubs & Chairman, Incapital LLC

Sponsor Street
 Grand Ballroom

10:00 am Break

10:15 am **A Sessions**
 CDs
 Corporates/Preferreds
 Munis

Economic and Regulatory Update
 What to Expect in 2014
 The State of Muni Insurance

Salon A, B, C, or D

11:00 am Break

11:15 am **B Sessions**
 Agencies & Mortgages
 Structured Products
 Munis

Up Your Game: Taking Your Agency & MBS Business to a New Level
 Too Controversial to Print!
 Muni Market Post 2013's High Profile Issues

Salon A, B, C, or D

5:00 pm - 7:00 pm Registration

Mizner Center

6:00 pm Cocktail Reception

Sponsor Street

7:30 pm **Product-Specific Dinners**
 Agencies
 CDs
 Corporates/Structured Products
 Mortgages
 Munis

Lucca (resort restaurant)
 Sea Grille (shuttle to resort restaurant)
 501 East (resort restaurant)
 Saporì (shuttle to local restaurant)
 Lucca (resort restaurant)

Saturday, February 8, 2014

7:15 am Fishing Tournament
 8:00 am Golf Tournament
 10:30 am Tennis Tournament

Shuttle to Hillsboro Inlet Fishing Center
 Resort course
 Resort courts

OPENING SESSION

Welcome

George Barbar, SFBTA President

Economic Update

Turning the Corner: A New Phase for Growth and for the Federal Reserve



Carl R. Tannenbaum, Senior Vice President/Chief Economist, Northern Trust

Carl Tannenbaum serves as Northern Trust's main spokesman on the economy. He publishes weekly commentaries and is frequently interviewed by media outlets such as: The Wall Street Journal, Bloomberg, and Reuters. Mr. Tannenbaum briefs clients and colleagues on the economy and business conditions, prepares the bank's official economic outlook and participates in forecast surveys. He is a member of the bank's investment policy committee and its asset/liability management committee. Prior to joining Northern Trust, Mr. Tannenbaum spent four years at the Federal Reserve, where he led the risk section.

He was deeply involved in the central bank's response to the 2008 financial crisis, helped to create and conduct its stress testing program, and advised senior Federal Reserve leaders on developments in banking and the financial markets. Mr. Tannenbaum began his career in banking at LaSalle Bank/ABN AMRO, a global banking organization with \$1 trillion in total assets. He served for more than 20 years there as the organization's Chief Economist and Head of Balance Sheet Management. Mr. Tannenbaum is a past Chairman of the National Association for Business Economics, the Conference of Business Economists, the American Bankers Association's Economic Advisory Committee, the North American Asset/Liability Management Association, and the Bank Administration Institute's Treasury Commission. Mr. Tannenbaum also serves on the Board of Working in the Schools (WITS), a literacy organization that supports the Chicago Public Schools. Mr. Tannenbaum holds an M.B.A. and a B.A. in finance and economics from the University of Chicago.

Keynote Address

From Bonds to Baseball



Tom Ricketts, Chairman, Chicago Cubs and Chairman, Incapital LLC

Tom Ricketts co-founded Incapital LLC in 1999 and since its launch, Incapital and its acquired entities have underwritten over \$275 billion of corporate and U.S. Agency bonds for such issuers as Bank of America, GE Capital, Goldman Sachs, Caterpillar Financial, Dow Chemical, Ford Credit, Federal Farm Credit Bank and TVA. Incapital is also an underwriter, distributor and liquidity provider in the certificates of deposit, structured note, mortgage and municipal bond markets.

Tom was on the Board of Directors of TD Ameritrade Holding Corporation from 2002 through 2007. He holds the Chartered Financial Analyst designation and has a B.A. and M.B.A. from the University of Chicago. Tom was the University of Chicago's Graduate School of Business Distinguished Young Alumnus for 2005. From 1996 to 1999, Tom was a Vice President and an investment banker for The Chicago Corporation and the brokerage division of ABN AMRO Inc. From 1988 to 1994, he was a market maker on the Chicago Board Options Exchange. In 2009, Tom became Chairman of the Chicago Cubs after leading the Ricketts Family acquisition of the team.

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Economic and Regulatory Update

Discussion will have a macro analysis of the current state of the banking industry, including an update on IDC Scores and scoring methodology, and an overview of pending regulatory changes stemming from Basel III that could dramatically change the landscape of the CD market in the future.

Moderator: Edward Deeb, Managing Director, Incapital LLC



Paul T. Clark, Partner, Seward & Kissel LLP

Paul Clark joined Seward & Kissel in 1984, and has been a partner since 1989. He specializes in banking and securities law matters, including related legislative and regulatory issues. Between 1984 and 2000, Paul's practice concentrated on legislative issues affecting the financial services industry, particularly as they relate to the banking activities of securities firms. During that period, he represented one or more of the national securities firms on all major legislation intended to restructure the relationships within the financial services industry, including the Gramm-Leach-Bliley Act of 1999.

As a result of his work as lead legislative counsel for the securities industry on the 1991 law that regulates the brokering of deposits, and his representation of the industry in negotiating the FDIC regulations implementing the law, Paul is nationally recognized as an expert on brokered deposit products, including certificates of deposit and various deposit account "sweep" arrangements. He advises financial services firms on regulatory compliance, program documentation and state law issues. He also works with the federal securities and banking regulators to obtain necessary interpretive guidance.

Paul is the author or co-author of two major articles on banking law, including a 2012 article on FDIC pass-through insurance. He has served as counsel to the Securities Industry Association's (now the Securities and Financial Markets Association) Brokered Deposit Committee and the National Commission on Saving and Investment in America. Paul is currently a member of the Advisory Board of the Berkeley Center for Law, Business and the Economy and the National Advisory Committee of the National Museum of Women in the Arts.



John E. Rickmeier, President and Chief Executive Officer, IDC Financial Publishing, Inc.

Mr. Rickmeier has over 45 years of experience in evaluating financial institutions. In 1984, Mr. Rickmeier converted the regulatory accounting submitted in Call Reports to the Office of Thrift Supervision into Generally Accepted Accounting Principles (GAAP). With the GAAP database on thrifts and banks, IDC was uniquely positioned to analyze the Ohio crisis and subsequent failure of many banks and thrifts. As CEO of IDC Financial Publishing, Mr. Rickmeier designs and manages the processes and analytics used in the evaluation of bank, savings institutions and credit union financial ratios, the value-added evaluation of bank investment portfolios, the value-added analysis of bank loan portfolios, and the efficiency analysis of the cost of funding a financial institution. Mr. Rickmeier and his analytical team evaluate and rank quarterly over 15,000 banks, savings institutions, and credit unions. IDC ratings of financial institutions have become the standard in evaluating the safety and soundness of institutions issuing brokered certificates of deposit. IDC ratings are used by Federal Reserve banks, Fannie Mae, Freddie Mac, Ginnie Mae, insurance and credit card companies, and many state and municipalities as a guide for determining financial relationships. IDC ratings are also used by financial firms specializing in brokered certificates of deposit, individuals and institutions investing in certificates of deposit, and individuals concerned about their bank safety rating. Before founding IDC Financial Publishing, Inc., Mr. Rickmeier acted as both chairman of an investment committee and portfolio manager for a Midwest investment advisory firm. Prior to 1972, as chief economist for a New York investment strategy firm, he consulted with over 300 financial institutions.

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CORPORATES / PREFERRED

What to Expect in 2014

This session will explore:

- “The State of the Broker Dealer Community” with Tom Kane
- Corporates - “New Issues... What to Expect in a Rising Rate Environment” with Chris O’Connor
- Preferreds - “What will be Hot for 2014” with Allen Hassan

Moderator: Thomas G. Kane, Managing Director, Incapital LLC

Allen Hassan, Managing Director, BTIG LLC

Allen Hassan has spent more than 20 years focusing on fixed income products, with a specialization in Preferred Stock. Allen started his career at Lehman Brothers in Fixed Income Sales and Trading. After Lehman, Allen joined Prudential Securities where he was instrumental in their Fixed Income distribution capabilities and led their institutional Preferred business. Allen then left to start the Preferred Desk at Jefferies and Co. in 2003. In April 2011, BTIG hired Allen to start their Preferred Desk, expanding the firm’s product capabilities. BTIG has since gone on to develop a robust new issue preferred business successfully bringing new issues to the market and incorporating trading partners. BTIG’s Preferred Product capabilities complement the firm’s existing equities, fixed income and prime brokerage offerings. BTIG LLC is a premier institutional brokerage and fund services company. Founded in 2002, BTIG employs more than 400 professionals in five different countries. BTIG has ten U.S. offices, including: New York, San Francisco, Chicago, Los Angeles and Dallas. Allen was born and raised in Los Angeles, California. He received his Bachelors of Science in Finance from Touro College. He has also studied at New York University.



Thomas G. Kane, Managing Director, Incapital LLC

Tom Kane joined Incapital in 2005 and is currently a Managing Director overseeing dealer fixed income sales. This includes all new issue and secondary corporate notes, new issue and secondary Agencies, CDs, munis and structured notes. Prior to joining Incapital, Tom managed the fixed income sales office in Chicago and San Francisco for Spear Leed’s and Kellogg / Goldman Sachs for 13 years. Tom has 31 years’ experience in fixed income securities, including both sales and sales management. Tom received his B.S. in Finance from St. John’s University in Queens, New York.



Chris O’Connor, Managing Director, Incapital LLC

Chris O’Connor oversees Incapital’s debt capital market platform and is based in Incapital’s Boca Raton office. Before joining Incapital, Mr. O’Connor was a Managing Director at Pierpont Securities, where he was in charge of Capital Markets. Mr. O’Connor was formerly at Bear Stearns where he ran the Global Syndicate and Capital Markets business. Previously, he worked at Salomon Brothers and First Boston as a secondary corporate bond trader. Mr. O’Connor is a graduate of Washington and Lee University and has an MBA from Harvard. He also spent five years in the US Army as a Field Artillery officer.

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MUNIS

State of Muni Insurance

This session will provide an update on secondary insurance for municipal bonds and trading opportunities.

Moderator: Jim Wangness, COO, TMC Bonds LLC



Bryan Baebler, Vice President, Head of Capital Markets, Build America Mutual

Bryan Baebler is Head of Capital Markets for Build America Mutual. He manages the competitive bid and secondary market desks and is responsible for primary and secondary markets business. He joined BAM in April 2013 from Barclays, where he was a Vice President on the Municipal Primary Syndicate Desk for three years. Prior to that, he was a Short-Term Municipal Securities Trader at Barclays/Lehman Brothers and before that a Municipal Securities Trader in the Fixed Income Group at Vanguard Group. Bryan earned his B.S. in Applied Economics and Management at Cornell University in Ithaca, NY.

Chris Chafizadeh, Managing Director, Head of Origination, Assured Guaranty Municipal

Chris joined Assured Guaranty in 2012 following a 20 year career in Public Finance at MBIA, most recently as Head of their Business Group. At Assured Guaranty, Chris is responsible for business development and origination in all municipal sectors covered by Assured.

Chris is a frequent speaker at industry conferences and is a Member of the Municipal Analyst's Group of New York (MAGNY), the National Federation of Municipal Analysts (NFMA), the National Council of State Housing Agencies (NCSHA), the Healthcare Financial Management Association (HFMA), the American Finance Association, the Municipal Bond Club of NY, NACUBO, the Municipal Forum of New York, the Fixed Income Analysts Society, the Government Finance Officers Association (GFOA) and the Education Finance Council.

Mr. Chafizadeh earned a Bachelors of Science (BS) degree in Business Administration/ Finance from Saint Michael's College in Winooski Park, Vermont and a Master of Business Administration (MBA) in Corporate/Investment Finance from Pace University's Lubin Graduate School of Business in New York.

AGENCIES & MORTGAGES

Up Your Game: Taking Your Agency & MBS Business to a New Level

*Moderators: George Barbar, Senior Managing Director, Mesirow Financial
Patrick Leary, Managing Director, Incapital LLC*

Our goal for this year's session is for participants to gain additional insight into their asset class and take practical selling points back with them to the office. The session will open with four strategists each giving their best trade idea for 2014... all of you will vote on which strategy you like best! Then everyone's knowledge of the markets and issuers will be put to the test in an exciting, interactive game. Don't miss this opportunity to expand your sales and trading techniques – or the chance to win a prize!

Anand Bhattacharya, Managing Director, Research & Strategy, Incapital LLC

Anand K. Bhattacharya consults with Incapital LLC on the research and valuation of securities. He maintains a position as Professor of Finance Practice in the Department of Finance, W.P. Carey School of Business, Arizona State University and has consulted with financial institutions on issues of balance sheet restructuring and asset valuation. Prior to joining ASU in 2009, he was a Managing Director responsible for the management of fixed income research and strategy; development of trading, valuation and risk management systems; and management of technological infrastructure at Countrywide Capital Markets Inc. Earlier in his career, Dr. Bhattacharya held positions in research and product management at Merrill Lynch Capital Markets, Franklin Savings Association and Security Pacific Merchant Bank. He has written extensively in various facets of fixed income valuation and debt portfolio management and authored or co-authored over 65 publications in various academic, professional journals and industry handbooks. He has also co-authored or co-edited 3 books on mortgage-backed and asset-backed securities. Dr. Bhattacharya earned his Ph.D. in Finance from Arizona State University in 1984.



Ryan Graf, Vice President, US Rates Strategy, Mesirow Financial

Ryan Graf generates trade ideas and macro strategy with a focus on the U.S. interest rate market. Prior to joining Mesirow, Ryan was an Agency Strategist at RBS Securities for four years where he focused on macro themes and relative value trade ideas in the U.S. Agency, USD covered bond, and USD supranational and non-U.S. agency space. Ryan holds FINRA Series 7 and 63 licenses. He holds a Master of Business Administration from the University of Chicago and a Bachelor of Science in Economics from Purdue University.



Aaron Kohli, Vice President, BNP Paribas

Aaron Kohli is a U.S. Rates Strategist at BNP Paribas with over 10 years of experience in the financial industry. In his current role, Aaron focuses on TIPS and Treasuries and has worked as a strategist since 2011. Prior to BNP Paribas, Aaron worked in Mortgage Research at Citigroup and in Risk Management at BlackRock before becoming a strategist at Greenwich Capital. Aaron graduated from Cornell University with a Bachelors Degree in Economics and a focus in Computer Science.

AGENCIES & MORTGAGES (CONT.)



Thomas McHugh, Managing Director, Head of Rates, JVB Financial Group, LLC

Thomas McHugh serves as a Managing Director and Head of Rates and the financing desk. He has over 15 years of experience in structured financing, hedging strategy, and portfolio management. His primary responsibilities include the management of all TBA and Repo trading as well as structuring all liabilities for the firm. Tom was most recently the Head of Liability Trading at Highland Financial Holdings Group, a relative value fixed income hedge fund. While at Highland, Tom managed the fund's \$15 billion high-grade, investment grade, and subprime MBS, ABS and CMBS funding books, and his responsibilities included: trading and structuring all liabilities; hedging the funds interest rate risk using both Euro dollar bundles and exchange traded options; oversight of the trade margining and exposure to counterparties; coordination of trade settlements; cash management and maintaining the trading and credit relationships with the broker dealer community. Tom was also instrumental in the negotiations of the credit terms within all trading agreements. Tom began his career with Morgan Stanley & Co. as an analyst on the municipal bond trading desk in both the NYC and San Francisco offices. He graduated from Lycoming College with a BA in Business Administration and Economics.

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Too Controversial to Print!

*Moderators: Glenn Lotenberg, Managing Director, Incapital LLC
John G. Tessar III, Managing Director, Structured Products, JVB Financial Group*



Akinchan Jain, The World Bank

Akinchan (Aki) Jain is a Senior Financial Officer in the Derivatives and Structured Finance team at the World Bank Treasury. His team is responsible for all structured bond issuance by the World Bank, from callable bonds to more exotic structures. Aki holds a bachelor's degree in economics and an MBA in Finance from American University.



Raul E. Perez III, Director, Structured Solutions Group, BNP Paribas Securities Corps.

Raul joined BNP Paribas, in May 2011, and is responsible for structuring and marketing hedging strategies and investment products for private clients and various wealth management advisors throughout the Americas. Prior to that, Mr. Perez worked for HSBC Bank USA for 11 years, where he was responsible for marketing equity derivatives and interest rate derivatives to wealth management advisors and private clients in the United States. Mr. Perez has a Bachelor of Science degree in Finance from Fordham University.



Robert Sowinski, Director, Structured Product Sales, Institutional Clients Group, Citigroup, Inc.

Robert Sowinski is a Director at Citigroup within US Structured Product Sales. Rob is leading a three person team currently responsible for Structured Product sales to retail wire-houses, wholesalers, broker-dealers and banks. A 15-year veteran of Citigroup, Rob was a founding member of the Fixed Income Structured Products which was created in 2005. The group merged with Equity Structured Products in early 2009 to form Citifirst Structured Investments, a multi-asset platform. Rob and team led the first initiative to distribute Citi's suite of structured products to external clients as early as 2007 and they continue to expand those relationships.

MUNIS

Muni Market Post 2013's High Profile Issues – Puerto Rico/Detroit/Jefferson County

Moderator: Ed Holleran, Director, TMC Bonds LLC



Peter Bianchini, Managing Director, Senior Municipal Strategist, Mesirow Financial

Peter Bianchini, located in San Francisco, serves as the senior municipal strategist for Mesirow Financial's Institutional Sales and Trading department. He has more than 25 years of experience in the industry and is responsible for credit research support for the Global Markets Division. Prior to joining Mesirow Financial, Peter was a managing director and the head of West Coast Origination at XL Capital Assurance. Before that, Peter was a vice president at Charles Schwab, where he was responsible for research and analytical support for 10 municipal funds, totaling approximately \$21 billion under management. Peter began his career in Public Finance at Standard & Poor's in NY and San Francisco, working on a broad range of credits including Transportation, Infrastructure, Not-For-Profit and General Government. Peter is very involved in industry organizations, including the National Federation of Municipal Analysts, which he chaired in 2002 and the Society of Municipal Analysts.

He holds many professional achievements, notably the National Federation of Municipal Analysts Meritorious Service Award (May 2005) and multiple-year recognition as a First Team or Second Team All-Star by Smith's Research & Ratings Review. Peter earned his Bachelor of Science degree and Masters of Business Administration degree from New York University.



Richard Larkin, Senior Vice President, Director of Credit Analysis, HJ Sims & Co., Inc.

Richard Larkin is a Senior Vice President and Director of Credit Analysis, joining Herbert J. Sims in February 2008, where his first assignment was to testify before the House of Representatives on the Bond Insurance Crisis. Prior to joining Sims, Dick worked at J.B. Hanauer, where he performed high-yield municipal bond analysis. Earlier in his career, Dick was a Managing Director in FitchRating's public finance group and served as the Co-chairman of its Public Finance Criteria Committee.

Dick was also a Managing Director and Chief Municipal Rating Officer at Standard & Poor's where he was responsible for municipal rating policies, practices, governance and criteria. Following a twenty-one year career at S&P, Dick served as a financial advisor to local governments at Fairmount Capital Advisors, where he developed credit enhancement programs for public pension funds. Later, he helped found Reliance SRL, a rating agency that performed local credit ratings in Uruguay.

He has been quoted in Time, Newsweek, The New York Times, Forbes, Barrons, the Financial Times and the Bond Buyer as well as other national publications. Dick has also made television appearances on CNBC, Fox Business News, Bloomberg, Reuters TV, as well as the CBS and ABC television networks. In 1996, he was given the Award for Excellence by the National Federation of Municipal Analysts, and in 2008, 2009, 2010, 2011 and 2013, was elected the First Team Special Revenue Bond Municipal Analyst by Smith's Research & Gradings.

Arthur Schloss, Sr. Analyst, Invesco

Mr. Schloss is a Senior High Yield Municipal Analyst with Invesco (formerly Van Kampen) in the firm's Florida office. He has thirty seven years of industry experience starting with CS First Boston where he was a bond analyst and investment banker for 15 years. His experience also includes several years at both Fidelity Investments (where he headed the municipal research unit) and The Vanguard Group. He joined Van Kampen in September 1999. Van Kampen was acquired by Invesco in mid 2010. Prior to entering the investment industry, he was a budget analyst for the Connecticut General Assembly.

Mr. Schloss holds a bachelor's degree in philosophy and political science from the Maxwell School of Syracuse University as well as a Master's degree in Public Administration from that institution. He has taught a graduate level seminar in municipal finance at that school for many years. In addition, he was awarded the designations Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU), and Chartered Advisor for Senior Living (CASL) by the American College of Financial Planning.

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CHARITIES

Part of the mission of the South Florida Bond Traders Association is to support local South Florida charities and each year we ask our members to nominate organizations that have had a meaningful impact on their lives and our community. Recommendations are reviewed by the Board of Directors to select recipients of a cash donation. A portion of the proceeds for this year's conference enables SFBTA to make a difference for the following nonprofit organizations:



The mission of Angel's Pediatric Heart House (APHH) is to provide financial, emotional and social support to South Florida (Palm Beach, Broward and Miami-Dade Counties) children with Congenital Heart Defects (CHD) and Childhood Acquired Heart Disease and raise CHD awareness.



APHH helps ease the financial and emotional burdens that CHD places upon a family, while providing comfort to children as they and their families cope with extended hospital stays associated with their illness. Our monthly hospital outreach program to pediatric cardiac intensive care units at South Florida children's hospitals assists us in identifying families in need or in financial crisis due to their child's life threatening illness. Congenital Heart Defects are the number one birth defects in the U.S. and South Florida. Angel's Pediatric Heart House is celebrating 10 years of providing free programs and services and the only nonprofit organization serving the non-medical needs of the South Florida CHD community. www.aphh.org



Jayne Mirsky has been living in Florida for 39 years, married to her husband Stu for 37 years, is the loving mother of three daughters and three granddaughters and needs a lifesaving liver transplant. Jayne wasn't feeling

quite right a few months back. She went to her doctors for a series of tests only to learn she had a malignant tumor on her liver. Due to a pre-existing medical condition, the only health insurance Jayne was able to get was severely inadequate, so the hospital required a \$25,000 co-pay upfront! Her husband scrambled to get a credit card company to allow a large charge in order for the surgery to proceed.

During surgery that day, the doctor made the decision to abort the operation due to the size and location of the tumor. The removal would take away too much of her liver, a liver already in a weakened state making recovery to a healthy life unlikely. He said Jayne will need a liver transplant to survive! Jayne and Stu find themselves against a challenge they cannot face alone. In addition to the \$25,000 paid out-of-pocket for an operation that did not benefit Jayne, they are now being told nearly \$200,000 is required as the co-pay to be paid upfront just to be listed! Jayne

CHARITIES (CONT.)

is a kind, warm, loving wife, mother, grandmother, and friend to so many people who think the world of her and will do whatever they can to help her raise the money for this transplant.

To help ease this enormous monetary burden, a fund raising campaign in Jayme's honor has been established with HelpHOPELive, a nonprofit organization that has been assisting the transplant community for 30 years.

www.helphopelive.org



Inspirit is a community-based nonprofit organization that brings live music and the performing arts to nursing homes, hospitals, rehabilitation facilities,

assisted living facilities, Alzheimer's day care centers, and other facilities serving special needs children, veterans, dementia patients, emotionally disturbed or physically disabled members of our community who are isolated in their environment. Inspirit produces live cultural performances at no cost to host organizations throughout Palm Beach County.



Performances typically occur in a small group setting for one hour with an average audience size of 25-30. The experience of live music brings joy to audience members and provides an opportunity for human interaction on a level that only the arts can provide. Founded in 2000, Executive Director, Ginny Meredith is a musician and breast cancer survivor who experienced music as an important part of her own healing process and continues to serve our community with the healing power of music!

www.inspiritlive.org



Place of Hope is a unique faith-based, state-licensed child welfare organization providing family-style foster care (emergency and long-term); family outreach and intervention; maternity care; safety for victims of domestic minor sex trafficking; transitional housing and support services; adoption and foster care recruitment and support; hope and healing opportunities for children and families who have been traumatized by abuse and neglect throughout our region.



Place of Hope has been blessed with the opportunity to expand our services to meet the needs of youth and their families within the South County region. At the beginning of the year, we were given the opportunity to open Place of Hope at the Haven Campus in Boca Raton. This campus will be similar to our Paxson Campus, in that it will provide family-style residential foster care for sibling groups and other special needs youth in foster care in the South County area. www.placeofhope.com

SATURDAY ACTIVITIES

FISHING TOURNAMENT

Ready to go on a saltwater fishing charter in beautiful South Florida? The Hillsboro Inlet Fishing Center in Pompano Beach has easy access to "Sailfish Alley" - a section of water that runs between one and three hundred feet of water on the inside of the Gulf Stream and acts like a conveyor belt bringing in all types of sport fish including Kingfish, Sailfish, Wahoo and Dolphin!

Wear a hat and sunglasses and you are ready to join us! Meet at the Shuttle pick up area (across from Golf Clubhouse) at 7:15 am... bus leaves promptly at 7:30 am (there will be coffee available on the bus). Fishing until 12:00 pm, and we should return to the resort around 1:00 pm.

TENNIS TOURNAMENT

The Boca Raton Resort & Club sets the standard for tennis in South Florida. Featuring a world class tennis center with 30 immaculate clay-based courts and one of the finest teaching programs in the region, it is regularly listed by Tennis Magazine as one of the top tennis programs in the country. We will meet at the clubhouse at 10:30 am. Wear appropriate tennis shoes, attire, and sunglasses. Demo racquets are available for rental.

GOLF TOURNAMENT

Boca Raton Resort & Club is home to two of the finest and most renowned golf courses in South Florida. The Resort Course was built in 1926 and enjoys world fame and acknowledgement as one of Florida's golden age courses. This distinctive Resort Course with a signature water feature designed by Hugh Hughes promises to provide a truly exclusive golf experience. Tournament play is a four person scramble format. Club rentals are available - contact the Pro Shop directly at 561.447.3419. Meet at the clubhouse at 8:00 am.

SFBTA

South Florida Bond Traders Association, Inc. (SFBTA) is a non-profit, professional membership organization comprised of investment and trading professionals in the South Florida area. We represent many firms involved in the buying, selling, and trading of all fixed income securities.

SFBTA is committed to the following objectives:

- Provide members with educational opportunities including seminars, conferences, and training sessions relating to current issues facing the securities trading industry.
- Sponsor social and networking events to encourage members and other industry professionals to develop and deepen professional relationships.
- Support the South Florida community through funding of local charities and scholarships.

www.SouthFloridaBondTraders.org

SOUTH FLORIDA BOND TRADERS ASSOCIATION



Community
Involvement

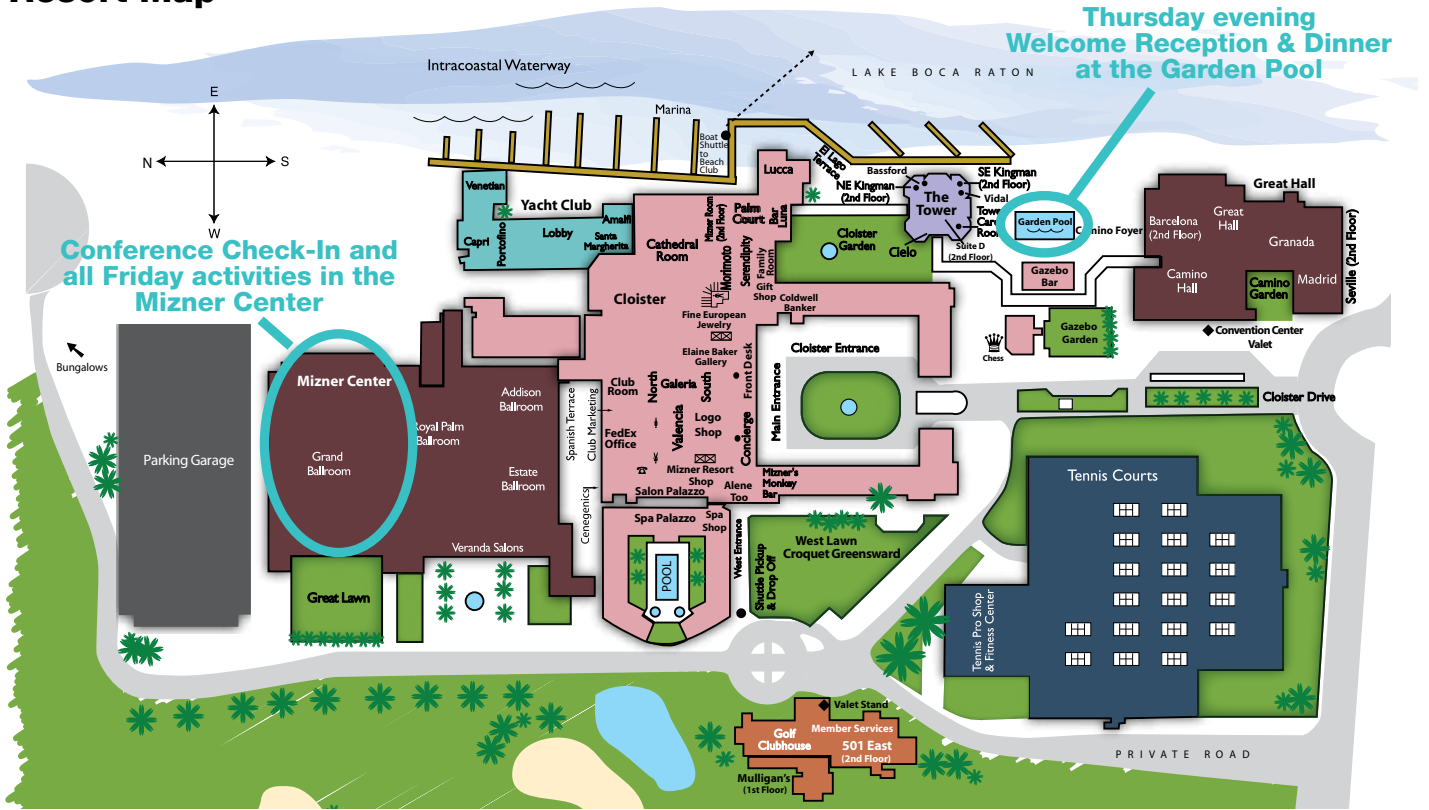


Networking
Events

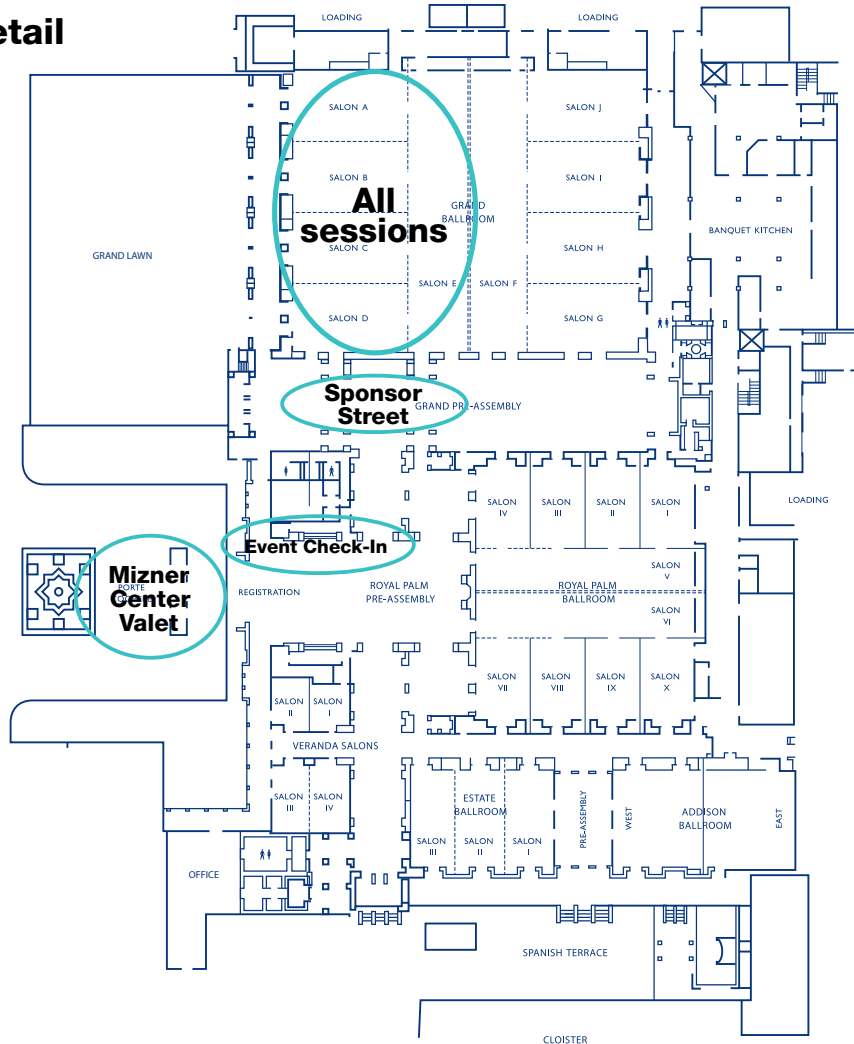


Annual
Conference

Resort Map



Mizner Center in detail



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