

LUNCH & LEARN

# POSITIONING YOUR PORTFOLIO

A REVIEW OF WHAT TO EXPECT IN OUR CURRENT MARKET ENVIRONMENT

**Tuesday, June 14**

**Noon - 2:00 pm**

INCLUDES CHOICE OF BOXED LUNCH

**Bernstein Private Wealth Management**

227 WEST MONROE SUITE 5900  
CHICAGO, ILLINOIS 60606

**\$35 Members**

**\$55 Non-members**

PROCEEDS TO BENEFIT INTERNATIONAL CHARITY HELPING THE PEOPLE OF UKRAINE

CANCELLATION WITH REQUEST FOR REFUND MUST BE RECEIVED 7 DAYS IN ADVANCE OF THE EVENT. REGISTRATION MAY BE TRANSFERABLE.



**Jason Arends**  
PRINCIPAL AND HOST

Jason is a trusted fiduciary who works on behalf of his clients' goals and their family needs. Jason understands the risks, rewards, and volatility of concentrated single-stock positioning and can provide strategies to efficiently reduce exposure and meet family goals through gifting and philanthropy. He also has experience working in a family business and can provide insight into the complexities that come in the different stages of the business lifecycle, helping you offset any risks. Jason has successfully helped many individuals and families build outside portfolios to fund family goals and wishes. Having been a client of Bernstein's first, later joining the firm as an advisor, he offers an interesting perspective and unique approach to his client-advisor relationships.



**Michael P. Heneghan**  
CFA, CAIA  
SENIOR INVESTMENT STRATEGIST

Michael P. Heneghan is a Vice President and Senior Investment Strategist for Bernstein Private Wealth Management and is in the firm's Chicago office. He is a member of Bernstein's Private Client Investment Policy Group, which provides asset allocation, investment and risk management advice for high-net-worth clients, endowments and foundations. Michael has a BS in finance and economics from Illinois State University at Normal, IL, and an MBA in finance and accounting from the Kelley School of Business at Indiana University in Bloomington, IN. Michael is a Chartered Financial Analyst and a Chartered Alternative Investment Analyst professional. He is a member of the CFA Society of Chicago.