



## NextGen

### Summer Seminar—New York

#### Wednesday, June 21

Deutsche Bank Center  
One Columbus Circle, New York, NY

- 8:30 am Arrivals
- 8:45 am **Welcome and introductions**  
Arjun Nagarkatti, Amrit Walia and JP Egui
- 9:30 am **Session: Investing 101**  
Eric Cheung, Wall Street Prep  
The importance of financial literacy and investing including establishing financial goals and risk tolerance will be reviewed in this session. Working in teams, you will analyze, and rank Investments based on historical risk adjusted returns. Teams present and shares their analysis.
- 12:30 pm Lunch meetings with management
- 2:30 pm **Session: Markets outlook**  
Deepak Puri  
An analysis of current economic and financial landscape including our outlook on macroeconomics and various asset classes
- 4:00 pm **Session: A Geo-political view**  
Mike Moran  
Hear from Deutsche Bank's Washington DC "insider" about global politics and the potential impact on our personal and professional lives.
- 5:00 pm **Event: Networking reception**  
9<sup>th</sup> Floor South Terrace
- 7:00 pm Day concludes

#### Thursday, June 22

Deutsche Bank Center  
One Columbus Circle, New York, NY

- 9:30 am **Session: An overview of DPM and the ways we invest**  
Neal Elkin  
A look at Deutsche Bank's Discretionary Portfolio Management (DPM) organization and the ways we invest on our clients' behalf.
- 11:00 am **Session: Lending**  
Joshua Frank  
During this session, we will review typical client scenarios associated with Wealth Management's loan product offerings, including structured, commercial and residential. We will also cover the lending process and the questions every lender—and borrower—should be asking.
- 12:30 pm Break for lunch
- 2:00 pm **Session: Alternatives workshop**  
Eugenia Kolomeitseva  
This interactive session will explore the Alternatives space with a focus on Private Equity, Private Credit, Private Real Estate and Hedge Funds.
- 3:30 pm **Session: Only One - Saving our planet - together**  
Aaron Kinnari and Jeremiah Kittredge  
Today's crises can be overwhelming, but when we act together, small steps have big impact. During this discussion, listen to stories that have sparked change for people and planet.
- 5:00 pm Day concludes



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#### Friday, June 23

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- 10:15 am **Session: Founders stories**  
Caroline Pugh – Moderator  
Jasper Lau and Tim Hwang  
Interactive conversation with Chairman, CEO and Co-founder of FiscalNote and Founder and CEO of 8090 Origin.
- 11:30 am **Session: Corporate social responsibility**  
Alessandra DiGiusto  
Interactive conversation about Deutsche Bank's philanthropic activities in community development, education and the arts, plus the research/selection process for philanthropy, applicable in the corporate world, as well as in your personal lives.
- 1:00 pm Break for lunch
- 2:30 pm **Session: Tours of art collection at Deutsche Bank Center**  
Blair Sacks  
Deutsche Bank has a world-renowned contemporary art collection, with works being acquired since the late 1970s. We will tour highlights of the collection at our U.S. headquarters.
- 4:30 pm **Event: NY Yankees baseball game**  
Transportation provided to the Bronx for an evening of American baseball. Watch the New York Yankees take on the Texas Rangers from the Delta Suite at Yankee Stadium. Refreshments will be provided.

#### Monday, June 26

Deutsche Bank Center  
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- 10:00 am **Session: Wealth/succession planning**  
Jacqui Valouch - Moderator  
Francesca Boschini and Susan Rounds  
This session covers the essentials of estate planning and intergenerational wealth transfer.
- 11:30 am **Session: Navigating the family office**  
Michael Zeuner, WE Family Office  
What is a family office and who needs the help of a family office. An examination of the complexities of choosing the right family office. What does it mean to manage a family office, what family offices should consider when evaluating wealth management partners, plus the role of impact investing.
- 12:30 pm Break for lunch
- 2:00 pm **Session: Trusts**  
Gary Marzolla and Francesca Boschini, Jacqui Valouch – Moderator  
During this discussion, we will review trust planning for global clients.
- 3:00 pm **Session: Philanthropy**  
Carly Maisel, Saahill Desai and Jacqui Valouch  
A conversation on dynamic multi-generational global family philanthropy.
- 4:30 pm Break
- 6:00 pm Dinner  
Porter House Bar and Grill  
10 Columbus Circle, New York, NY
- 9:00 pm Day concludes



## NextGen

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#### Tuesday, June 27

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- 10:00 am **Event: Meet at NYSE**
- 10:15 am **NYSE presentation, followed by tour**  
An exclusive opportunity to access the floor of the world's largest stock exchange.
- 11:45 pm Transportation provided to Deutsche Bank Center
- 12:45 pm **Working lunch: Meet and greet**  
Stefan Simon, CEO, Deutsche Bank Americas
- 1:15 pm **Session: Cyber security – Time to be aware**  
Christine Lienemann and Lutz Logemann
- 2:15 pm **Session: Fixed income**  
Jim Donofrio  
This presentation reviews fixed income investing including bond types, interest rates, credit ratings and portfolio allocations.
- 3:30 pm **Session: Insights from Deutsche Bank**  
Salman Mahdi  
What are your questions for our Vice Chairman of the International Private Bank – no topics are off limits.
- 4:00 pm **Session: Fireside chat with CalypsoAI**  
Neil Serebyrany and Salman Mahdi  
CEO and founder Neil Serebyrany talks about how a sense of mission and a technology gap led him to found CalypsoAI.
- 5:00 pm Day concludes

#### Wednesday, June 28

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- 10:00 am **Session: The 10% Entrepreneur**  
Patrick McGinnis  
A revealing discussion of the realities of full-time entrepreneurship, plus a look at the benefits of traditional careers versus non-traditional ones and the available opportunities for each.
- 12:00 pm **Event: Transportation provided to The Explorers Club, 46 E 70<sup>th</sup> Street**
- 12:30 pm **Lunch will be provided**
- 1:30 pm **Session: Sustainability at Deutsche Bank and our commitment to the oceans.**  
Emily Kreps and Delores Rubin  
Insights from and the journey through the world of sustainability. Guests will be invited to share views on how ESG may be impacting their home counties
- 3:00 pm **Session: Tour of club and conversation with club President**  
Ted Janulis  
A discussion on the importance and future of the Explorers Club in addition to investable oceans initiatives.
- 5:30 pm Transportation to dinner
- 6:00 pm **Event: Farewell dinner**  
Zuma, 261 Madison Ave  
New York, NY
- 9:00 pm Event concludes