

Tailoring Index-Based Strategies to Address Different Risk Philosophies



John Lunt
President
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John Lunt is the President of Lunt Capital Management, Inc. John has created a variety of diversified, tactical investment strategies used by financial advisors around the country. John and Ryan Hessesenthaler co-created the methodology for eight index strategies calculated by S&P Dow Jones Indices. He has been a featured speaker at investment conferences around the country, and has written extensively about financial markets. John is a charter member of the ETF Strategists Roundtable for key influencers associated with ETF management. From 2001 to 2014, he served on the board of Utah Retirement Systems (URS), a \$20 billion pension fund. From 2004 to 2007, he was elected by his peers as board president. John is currently a member of the investment committee for the \$8 billion Utah Educational Savings Plan (UESP). John completed the Program for Advanced Trustee Studies at Harvard Law School and finished a number of courses at the New York Institute of Finance on trading and portfolio management. He formerly worked on the Washington, D.C. staff of U.S. Senator Robert Bennett. John graduated Magna Cum Laude with University Honors from Brigham Young University with a degree in Economics, and he later received an MBA in Finance and International Business from New York University.



Sean O'Hara
President
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Sean O'Hara is the President of Pacer ETF Distributors. Sean began his career at PLANCO/Hartford in 1985, where he spent 22 years as wholesaler, divisional manager, and managing director of the national wholesaler team. In 2007, Sean joined Joe Thomson again, co-founder of PLANCO, at Pacer Financial to serve as a national wholesaling company for various products including exchange traded funds, exchange traded notes, Annuities, and SMAs.

In 2015, Pacer ETFs was launched. With Sean's leadership, the company has become one of the fastest growing ETF companies. Sean often appears on Fox Business Network, CNBC, and various other news outlets to give insight into the market.



Sam Stovall, CFP
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Sam Stovall is Managing Director of U.S. Equity Strategy at CFRA. He serves as analyst, publisher and communicator of S&P's outlooks for the economy, market, and sectors. Sam is the Chairman of the S&P Investment Policy Committee, where he focuses on market history and valuations, as well as industry momentum strategies. He is the author of *The Standard & Poor's Guide to Sector Investing* and *The Seven Rules of Wall Street*. In addition, Sam writes a weekly investment piece, featured on S&P Global Market Intelligence's MarketScope Advisor platform and his work is also found in the flagship weekly newsletter *The Outlook*.

Prior to joining S&P Global in 1989 and CFRA in 2016, Sam served as Editor In Chief at Argus Research, an independent investment research firm in New York City.

He holds an MBA in Finance from New York University and a B.A. in History/Education from Muhlenberg College, in Allentown, PA. He is a CFP® certificant and is a Trustee of the Securities Industry Institute®, the executive development program held annually at The Wharton School of The University of Pennsylvania.