

Dividend Strategies for an Unsteady Market



Eliot Bishop

**Director, Senior Investment Portfolio Strategist
Charles Schwab & Co., Inc.**

Eliot Bishop is a Director and Senior Investment Portfolio Strategist supporting Schwab Asset Management™. Mr. Bishop is primarily focused on representing the Schwab ETFs and Schwab index mutual funds to clients, advisers, sales channels, and the media. He also delivers education on the ETF industry and strategic beta strategies.

Previously, Mr. Bishop was a product manager for the Schwab ETFs and Schwab index mutual funds. Before that role, he was a member of the iShares national accounts team where he partnered with CIOs, chief market strategists, and due diligence personnel to open new opportunities at private banks for the iShares field sales team. Mr. Bishop began his ETF career with the iShares bank wealth management team where he sold ETFs to portfolio managers at private banks, bank brokers, and private client advisors across the Midwestern U.S. Previous to iShares, Mr. Bishop spent 18 months at a startup registered investment advisory firm and before that he worked in the branch office of Charles Schwab & Co., Inc. in Corte Madera, California.

Mr. Bishop earned Bachelor of Science degrees in both political science and environmental studies from the University of Oregon. He holds Series 7 and 66 licenses.



Kieran Kirwan, CAIA

**Director, Investment Strategy
ProShares**

Kieran Kirwan joined ProShares in 2013 and currently serves as Director, Investment Strategy. His responsibilities include portfolio analysis, education, product research and development, and the presentation of investment strategies using the company's ETFs. Prior to joining ProShares, Mr. Kirwan served in a variety of roles during a 15-year tenure with Deutsche Asset & Wealth Management (Deutsche Bank). Most recently he was a Vice President, serving as lead investment specialist representing several strategies in the global equity, commodities, infrastructure and real estate asset classes to prospects and clients. Before that, Mr. Kirwan was Vice President, Product Strategy and Economics, responsible for the platform's product profitability and distribution strategy initiatives, Vice President, Finance and Controlling Group, and an Associate Vice President with the Financial Reporting Group.

Mr. Kirwan earned a bachelor's degree in accountancy from the University of Illinois at Urbana-Champaign, holds Series 7 and 63 FINRA registrations, and holds the Chartered Alternative Investment Analyst designation.



Daniel Rendler, AIF
Financial Advisor & Compliance Manager
Silver Leaf

Since 2012, Daniel Rendler has guided individuals and the employees of a major employer through the process of defining their financial goals and developing effective retirement planning and investing strategies. He also has been active in the business prior to becoming a financial advisor, as a marketing consultant and assisting at numerous client events.

His role is to not only design a retirement plan that helps meet the needs of each client but to make sure that they thoroughly understand the factors involved, including their assets, liabilities, taxes, insurance, and goals. This education-based approach gives his clients the ability to make well-informed decisions and better manage their plans.

As a millennial who has incurred student loan debt and paid it off early, purchased his first home, and maximized his retirement plan contributions, Daniel is qualified to counsel and advise his peers on financial goal setting, planning, and effective investing.

A University of Wisconsin-La Crosse graduate, Rendler has earned the following professional licenses, registrations, and designations:

- Accredited Investment Fiduciary® (AIF®), which demonstrates knowledge and competency in the area of fiduciary standards
- Registered Representative and Investment Advisor Representative with COMMONWEALTH Financial Network, a leading independent Broker/Dealer; FINRA 7, 24 & 66
- Licensed life and health insurance agent



Rupert Watts, CFA, CAIA
Senior Director, Strategy Indices
S&P Dow Jones Indices

Rupert Watts is Senior Director, Strategy Indices at S&P Dow Jones Indices. His field focuses on alternate beta strategies, including factor-based indices, dividends, and volatility, as well as quantitative, thematic, and asset-allocation strategies. In his role, Rupert works closely with the sales, marketing, and Global Research & Design departments to bring new ideas to market.

Prior to his current role, Rupert worked at Deutsche Bank for almost 11 years, with the majority of this time dedicated to research and product development within quantitative investment strategies (QIS), with stints on the buy side and sell side. While in QIS, Rupert played a lead role in the successful launch of a risk premia platform, developing strategies across multiple asset classes and managing portfolio mandates for institutional clients.

Rupert is originally from the United Kingdom and earned a bachelor's degree in business and finance from the University of the West of England, Bristol. Rupert is both a Certified Financial Analyst (CFA) and a Certified Alternative Investment Analyst (CAIA).