

2024



Security Traders Association of Florida

42nd Annual Conference

St. Pete Beach, Florida



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Security Traders Association of Florida

All the Best in 2024

JonesTrading



Security Traders Association of Florida

42nd ANNUAL CONFERENCE

Welcome to Our 42nd Annual Conference



The Officers and Directors of STA Florida are excited to have you join us and would like to express our gratitude to those who traveled from various parts of the United States and Canada to be here. We hope you have a fulfilling and enjoyable few days with us.

Our heartfelt thanks go out to our sponsors, who continue to support us year after year. Hosting this conference is only possible with your valuable contributions and support. We appreciate your unwavering dedication to our organization's success.

It gives us immense pleasure to host this year's conference at the iconic Don CeSar Resort, which received rave reviews last year. We listened to your feedback and worked tirelessly to bring you back to this beautiful beach resort.

We have secured an [impressive lineup of dynamic speakers](#) for our panel discussions. Panel topics include Electronic Trading: Catch the Wave of Innovation | Compliance / Surveillance: Electronic Trading Surveillance and Supervision - Regulatory Guidance | Updates Across Asset Classes; and Market Structure: Viewing Market Structure Through the Multi-Asset Looking Glass.

You can always look forward to exciting networking events at the STA Florida conference. Enjoy the Cornhole Tournament, Golf Tournament, and the Fishing Excursion. Join us at the cocktail reception every evening for delicious food and beverages. On Friday evening, we are pleased to welcome a special guest speaker, [LTC \(R\) Robert Schaefer](#), Master Distiller & Co-Founder of American Freedom Distillery. Listen and enjoy Whiskey and War Stories while partaking in a Horse Soldier Bourbon Tasting.

As part of our community outreach, we select and honor a charity at every STA Florida conference. This year, we have chosen [Promise Fund of Florida](#) as our 2024 Featured Charity. This organization is fighting to end late-stage deaths from breast and cervical cancer. Please take the time to learn more about this noble cause by visiting our website page with [charity details here](#). We encourage you to participate in our fundraising activities, including raffles and silent auctions. We have amazing prizes such as a two-night stay at The Don CeSar resort, signed bottles of Horse Soldier Bourbon, a virtual closet overhaul with a Watson Style Group personal wardrobe stylist, and a six-hour private fishing excursion with the expert guidance of guest Captain Rich Konefal from Raymond James through P.R. Fishing Charter. A big thank you to these generous folks for their donations.

The addition of Patti Reed and Kristen Kring to my team this year proved invaluable in planning the upcoming conference. The meticulous attention to detail required for such a high-caliber event was made possible by their hard work and dedication. I am immensely grateful for their assistance and encourage anyone who encounters them during the next few days to express their gratitude as well.

Finally, I sincerely appreciate the STA Florida Officers and Board of Directors. Volunteering for these roles takes a significant amount of time out of their busy schedules, and we appreciate their dedication and commitment to promoting our conference. They are outstanding ambassadors for our affiliate.

We hope you take advantage of the breathtaking scenery and amenities that The Don CeSar Resort has to offer over the next three days. The staff here is always gracious and welcoming. But above all, we want you to have fun and enjoy the conference!

Sincerely,

Janice Hilsman

STA Florida President





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STA FLORIDA CONFERENCE

AGENDA

THURSDAY, FEBRUARY 15TH

- 1:00 pm-5:30 pm **Registration** (Lobby)
- 6:30 pm-8:30 pm **Welcome Reception & Charity Introduction**
(Rowe Pavillion)

FRIDAY, FEBRUARY 16TH

- 7:45 am-1:00 pm **Registration** (King Charles Foyer)
- 8:00 am-9:00 am **Networking Breakfast**
(South Terrace)
- 8:15 am-8:45 am **Board Of Directors Breakfast Meeting**
(Invitation Only)
- 9:00 am-9:15 am **Welcome Remarks And An Introduction Of Our
Charity Recipient, Promise Fund Of Florida**
(King Charles Ballroom)

PRESENTERS

Janice Hilsman,
STA FLORIDA President,
RAYMOND JAMES & ASSOC
Director, Capital Markets Compliance

Byron Mitson
STA FLORIDA, Vice President,
RAYMOND JAMES & ASSOC
Managing Director, Equity Trading



STA FLORIDA CONFERENCE

AGENDA

9:15 am-9:30 am

STA NATIONAL UPDATE

(King Charles Ballroom)

PRESENTER

James Hyde

STA Chairman

ICE/NYSE, Sr. Director ICE/NYSE Options

Head of Business Development and Strategic Partnerships

9:30 am-10:30 am

PANEL DISCUSSION:

Electronic Trading (Equity)

Catch The Wave Of Innovation

(King Charles Ballroom)

MODERATOR

David Cannizzo,

RAYMOND JAMES & ASSOC

Head of Electronic Trading

PANELISTS

Jesse Greif

ONECHRONOS

Chief Operating Officer

Brett Macleod

ABEL NOSER SOLUTIONS

Head Sell Side Division

Oliver Sung

CBOE

Vice President,

Interim Head of North American Equities

Lisa Utasi

CLEARBRIDGE INVESTMENTS

Director, Senior Trader



AGENDA

10:30 am-11:30 am

PANEL DISCUSSION:

**Compliance/Surveillance Electronic Trading,
Surveillance, & Supervision: Regulatory
Guidance And Updates Across Asset Classes**
(King Charles Ballroom)

MODERATOR

Erin Clemens
TRUMID
Head of Compliance

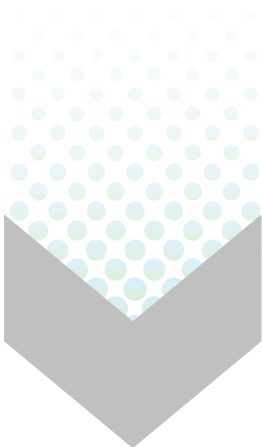
PANELISTS

Rick Agster
RAYMOND JAMES & ASSOC
SVP, Head of Fixed Income Compliance

Nikki Brinkerhoff
TRADESTATION SECURITIES, INC.
Chief Compliance Officer

Howard Meyerson
FINANCIAL INFORMATION FORUM (FIF)
Managing Director

Theodore Karn
THE KARN GROUP (TKG)
President



AGENDA

11:30 am-12:30 pm

PANEL DISCUSSION:

**Market Structure Viewing Market Structure
Through The Multi-Asset Looking Glass**
(King Charles Ballroom)

MODERATOR

Anna Ziotis Kurzrok
JEFFERIES, LLC
Managing Director, Head of Market Structure

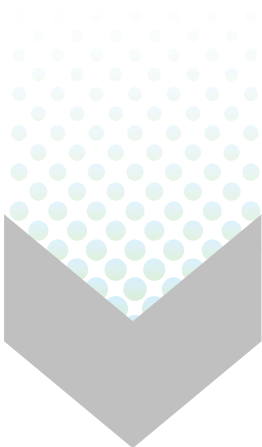
PANELISTS

Rich Delayo
RAYMOND JAMES & ASSOC
Director, Electronic Trading and Market Structure

Joanna Fields
Aplomb Strategies Inc.
Founder

Ed Hosty
ROBINHOOD SECURITIES
Sr. Director of Execution Services

Gary Stone
BLOOMBERG L.P.
Regulatory Policy Analyst and Market Structure
Strategist



STA FLORIDA CONFERENCE

AGENDA

12:30 pm-2:00 pm

Networking Lunch (Sunset Deck)

2:00 pm-4:00 pm

Cornhole Tournament (Beach)

6:30 pm-9:30 pm

Reception (South Terrace)
Featuring DJ Dave

7:00 pm - Guest Speaker & Bourbon Tasting

Guest speaker: LTC (R) Robert Schaefer,
Master Distiller & Co-Founder American Freedom Distillery

Robert has some stories as a retired U.S. Army Special Forces officer (Green Beret), diplomat, and senior international defense expert with over 28 years of experience working with senior foreign defense and military officials. He combined his military experience with his passion for Bourbon to produce Whiskey & War Stories.

Robert will tell stories as we taste his locally distilled bourbons.

Saturday, February 17th



8:00 am-9:00 am

Networking Breakfast (South Terrace)

9:00 am-1:00 pm

Fishing Tournament
(South Entrance, near fitness center)

12:45 pm-5:00 pm

Golf Tournament
7979 Bayou Club Blvd | Largo

Transportation to the course will be via your vehicle or a ride-share (Uber/Lyft).
The course is about 45 minutes away.

Box lunches will be available at the course.

7:00 pm-9:00 pm

Farewell Reception / Awards Ceremony
Announcement Of Charity Donations
(South Terrace) **Featuring DJ Dave**



Security Traders Association of Florida

42nd ANNUAL CONFERENCE

ELECTRONIC TRADING (EQUITY) CATCH THE WAVE OF INNOVATION

(King Charles Ballroom)

MODERATOR

DAVID CANNIZZO

Head of Electronic Trading
Raymond James & Associates

David Cannizzo has been a Managing Director and Head of Electronic Trading at Raymond James since late 2018. Based in New York, he oversees all institutional electronic equity trading for the firm. He has over 23 years of experience in equity trading, having held several different positions throughout his career. Prior to Raymond James, Mr. Cannizzo was a Managing Director in the Electronic Trading team at Evercore ISI and held senior roles within the Electronic and Portfolio trading teams at Liquidnet and ITG prior to that. Mr. Cannizzo began his career in equity trading at Societe Generale-Cowen. Mr. Cannizzo graduated from Lehigh University with a degree in Mathematics and has an MBA from Fordham University.



PANELISTS

JESSE GREIF

Chief Operating Officer
OneChronos

Jesse Greif is the Chief Operating Officer of OneChronos, based in New York. Before joining OneChronos, Jesse was Head of Product for Goldman Sachs Principal Liquidity Solutions, providing traders & asset managers electronic tools to access Goldman's internal capital through algorithm & routing offerings for intraday and benchmark liquidity. Before Principal Liquidity Solutions, Jesse was the global COO of Goldman's Equities Systematic Market Making business. Jesse holds an MBA from The Wharton School at the University of Pennsylvania and a Bachelor's degree in Behavioral Psychology from Northeastern University.



BRETT MACLEOD

Head of Sell-Side Division
Abel Noser Solutions

As Head of Abel Noser's Sell Side Division, Brett oversees the company's full suite of offerings provided to the broker dealer and exchange communities, including Multi Asset Transaction Cost Analytics, Regulatory Compliance and Trade Surveillance. With over fifteen years of experience, all at Abel Noser, Brett previously held roles focused in Electronic Trading, Asset Management TCA and Transition Management. Brett holds a B.A. in Business Management from Gettysburg College and lives in Boca Raton, FL with his wife and three children.





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OLIVER SUNG

Vice President, Interim Head of North American Equities
CBOE

Oliver Sung is Vice President, Interim Head of North American Equities at Cboe Global Markets, Inc. (Cboe). Based in New York, Sung is responsible for overseeing the product development and strategic growth of Cboe's U.S. and Canadian equities businesses. In this role, Sung leads his team in realizing Cboe's purpose of building trusted markets, delivering solutions to market participants throughout North America.

Previously, Sung was Senior Director, Head of North American Equities Execution Consulting, leading the analysis of Cboe's North American Equities business to help drive growth and the development of new products. Additionally, Sung oversees the creation of unique content for distribution to Cboe clients, providing comprehensive insight into Cboe's products and services, as well as the North American equities markets in general.

Sung has more than 20 years of industry experience and has held several leadership positions in the electronic trading space. Prior to joining Cboe, he was Managing Director, Electronic Trading, Project Management at Cowen, where he helped manage various projects for the company's electronic trading platform and service. Previously, Sung also held roles as Managing Director, Head of Electronic Execution at Convergenx and Head of Americas Execution Consulting/Next Generation Algo Product Management at Bank of America Merrill Lynch. Sung holds a Bachelor of Science in Economics from Carnegie Mellon University and Series 7, 24 and 63 licenses.





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LISA UTASI

Director and Senior Equity Trader
ClearBridge Investments



Lisa Marie Utasi, is a Director and Senior Equity Trader at ClearBridge Investments. ClearBridge Investments, a leading global equity manager is committed to delivering long-term results through active management. With 30 + years of industry experience, Lisa's primary trading focus includes the Large Cap Growth, International-Global Growth, Aggressive Growth, Appreciation Funds as well as contributing to trading in the ESG and INFRA products. During 2019-2020 Lisa lived in Sydney, Australia where she was dedicated to Clearbridge's integration of RARE Investments.

Personally, Lisa was elected to become the President of the Security Traders Association of NY (STANY) in 2004 and again in 2009. In 2004, Lisa was the first STANY President to open the NYSE on behalf of the organization and as an honor to its members. Lisa is a Current Member of the STANY Board and is an Advisor to the STANY Woman in Finance Group. She is also a Past Chair of the Security Traders Association, it's 3rd woman Chair since inception. And Lisa was the Chair or Co-Chair of the Trading Issues, Affiliate Liaison, Education, and Institutional Committees during her many years on the STA Board.

Lisa was inducted into the National Organization of Investment Professionals (NOIP) in 2004 and became NOIP's Chair of the Board from 2019-2020. She still sits on NOIP's Board as a Past- Chair.

Lisa is a Past Chair and current Member of the of the NASDAQ ITAC Committee and served on the NASDAQ Quality of Markets Committee. She participates as a member of the NYSE Institutional Traders Advisory Committee. Lisa is a member of Inst. Investor's Trader's Forum and the Investment Company Institute's Equity Markets Committee.

Lisa is the most recent recipient of Markets Media Woman in Finance Lifetime Achievement Award.

She has also been widely recognized for her service in the New York City charity community, and has received the Women on Wall Street Charitable Works Award and the Michael P. Beier Award for her dedication to raising

awareness and funding in the fight, vs. ALS. Lisa also served as an MDA National Vice- President for many years. During that time Lisa was a Member of the University of Pittsburgh's Brain Institute Advisory Committee.

And Lisa has so been a panelist in a Leaders in Philanthropy lecture series sponsored by the Center on Philanthropy and Civil Society, The Graduate Center, CUNY.

Lisa has completed ten marathons, including two for which she raised funds for the Leukemia and Lymphoma Society's Team in Training and two more for the Robinhood Foundation.

Lisa is also a Big as part of the Big Brothers Big Sisters of New York.

Lisa holds a B.A. in Political Science and a B.B.A. in Finance from Southern Methodist University.



Security Traders Association of Florida

42nd ANNUAL CONFERENCE

COMPLIANCE/SURVEILLANCE ELECTRONIC TRADING, SURVEILLANCE, AND SUPERVISION: REGULATORY GUIDANCE AND UPDATES ACROSS ASSET CLASSES

(King Charles Ballroom)

MODERATOR

ERIN CLEMENS

Head of Compliance
Trumid

Erin Clemens is Head of Compliance at Trumid, a fixed income electronic trading platform offering. Prior to joining Trumid, she held senior compliance roles at StoneX and Liquidnet. Ms. Clemens' expertise is in applying regulatory, technology and operations controls to financial technology broker-dealers. She is Co-Chair of the Compliance and Surveillance Working Group at the Financial Information Forum (FIF). She holds an MA in International Management and Technology from the New School in NYC.



PANELISTS

RICK AGSTER

SVP, Head of Fixed Income Compliance
Raymond James & Associates, Inc

Rick Agster, Head of Fixed Income Compliance, Raymond James & Associates, Inc. Rick Agster is the Head of Fixed Income Compliance at Raymond James & Associates, Inc. (RJA), a member of a diversified financial services holding company with subsidiaries engaged primarily in investment and financial planning, in addition to investment banking and asset management and is a top 10 municipal underwriter. Mr. Agster's team's responsibilities include regulatory change management and oversight of supervision of all aspects of fixed income sales, trading, operations and investment banking and also working directly with exam teams from various regulatory authorities. Mr. Agster is an active participant in industry compliance/legal groups in industry trade association that focus on fixed income issues, working with legislators, regulatory authorities and association members with respect to new rulemaking and industry best practices. Prior to joining Raymond James, Mr. Agster practiced at the law firms of Foley, Bryant Miller & Olive and Sidley.





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NIKKI BRINKERHOFF

Chief Compliance Officer
TradeStation Securities, Inc.

Nikki Brinkerhoff is the Chief Compliance Officer for TradeStation Securities, Inc. a self-clearing online broker dealer and FCM for self-directed clients. She has over 20 years' experience in financial service firms including introducing, dual registrants, chaperoning, FinTech, self-clearing and investment bank Broker Dealers, Registered Investment Advisors and banks. Her experience includes leading audit departments, developing risk and compliance programs for US and foreign registered financial services firms. She is an active member of industry groups like NSCP, FIF, FIA, FMA, SIFMA and is currently serving on the FINRA Regional Committee in the South Region and FINRA Uniform Practice Code Committee.



HOWARD MEYERSON

Managing Director
Financial Information Forum (FIF)

Howard Meyerson is the Managing Director of the Financial Information Forum (FIF). FIF is an industry association for broker-dealers, exchanges and technology vendors in the securities industry that is focused on implementation, operations, technology, compliance and reporting issues. Prior to FIF, Howard was General Counsel and Chief Compliance Officer at Liquidnet. Before Liquidnet, Howard worked at the Morgan Lewis law firm focused on transactional, compliance and regulatory matters for broker-dealers and other firms in the financial services industry. Howard has a B.A. from Columbia College, a J.D. from Harvard Law School, and a Certificate in Analysis and Design of Information Systems from the Columbia University Computer Technology and Applications Program.



TED KARN

President/Founder/Owner
The Karn Group (TKG)

Ted Karn is the President/founder/owner of The Karn Group (TKG). Since 2008, Ted has built TKG into one of the largest independent providers of compliance and surveillance solutions for broker/dealers and clearing firms. Previously, Ted was the President and Founder of Market Systems Inc. (MSI) where for 12 years, he led MSI to become the market leader in providing SEC Best Execution reports. MSI customers included almost all major US Broker/Dealer firms and clearing firms and was sold to Refinitiv in 2006. Ted's work experience includes trading for Merrill Lynch, First Boston and First Options. Ted has a BS degree in engineering physics from Cornell University and an MBA in Finance from New York University's Stern School of Business.





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42nd ANNUAL CONFERENCE

MARKET STRUCTURE VIEWING MARKET STRUCTURE THROUGH THE MULTI-ASSET LOOKING GLASS

(King Charles Ballroom)

MODERATOR

ANNA ZIOTIS KURZROK

Managing Director, Head of Market Structure.
Jefferies, LLC

Anna Kurzrok is a Managing Director at Jefferies and holds the role of Head of Market Structure. Prior to joining the firm, she held similar positions at BNP Paribas/Deutsche Bank, and at RBC Capital Markets where she was also responsible for U.S. and European Electronic Sales. Anna began her career at Investment Technology Group (ITG) where she worked for 14 years, ten of which were as an Equity Sales Trader. She received her B.S. in Economics from the Alfred Lerner College of Business and Economics at the University of Delaware.



PANELISTS

RICH DELAYO

Managing Director/Senior Sales Trader
Raymond James & Associates

Rich DeLayo is a Managing Director/Senior Sales Trader at Raymond James, working in the Global Electronic Trading and Market Structure group. Rich joined the firm in 2019 and his responsibilities encompass algo design and customization, execution consultancy, and market structure commentary. Over his 30+ year career, Rich worked at various firms including Virtu, RBC, and as a NYSE floor broker representing NFS. Rich started his career trading equities and options with discount broker Quick and Reilly. He received his B.S. in Finance from Fordham University's Gabelli School of Business.





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JOANNA LEE FIELDS

Founder

Aplomb Strategies Inc.

Ms. Fields is the founder of Aplomb Strategies Inc., with almost 25 years of experience in implementing technology solutions for financial regulatory, clearing and market structure change. At Aplomb she leverages her regulatory and technology background to develop risk management practices for registered entities and vendor third party technology firms. Her unique focus assists firms design holistic governance structures to help limit the impact of increased reputational, cybersecurity and regulatory risks.

Prior to starting Aplomb Strategies, Ms. Fields was the Head of Equities and Derivatives Market Structure for Deutsche Bank Securities Inc. (DBSI). Ms. Fields was also the Compliance Registered Options Principal and Derivatives Compliance Advisor for both DBSI and Credit Suisse First Boston (CSFB). In addition, Ms. Fields worked in Market Regulation for both the International Securities Exchange (ISE) and Chicago Board Options Exchange (CBOE). Ms. Fields began her career in economic litigation consulting with Lexecon Inc.

Ms. Fields served as the Chairman of the Options Trading Committee for the Securities Industry and Financial Markets Association (SIFMA). Ms. Fields has also held board positions with the Securities Traders Association of New York, and the Option Clearing Corporation's (OCC) Option Industry Council (OIC) as well as its separate Technology Board. Ms. Fields historically held committee positions with the Financial Industry Forum, the Futures Industry Association, and the Inter-market Surveillance Group.

Ms. Fields received her BA degree in art history and chemistry from Barnard College, Columbia University, and her MS in business and technology from New York University.





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GARY STONE

**Regulatory policy analyst and market structure strategist
Bloomberg L.P.**

Gary Stone is the Regulatory policy analyst and market structure strategist in the Regulatory Policy and Government Relations team at Bloomberg. A recognized expert on cross-asset market structure, he was a member of the U.S. Securities and Exchange Commission's Equity Market Structure Advisory Committee from 2015-2017. In 2014, he was named one of the top 100 most influential professionals in the capital markets by The Trade magazine.

Prior to this role, Gary was the Chief Strategy Officer of Bloomberg Trading Solutions and was responsible for identifying innovative product and market opportunities as well as building strategic relationships. Gary joined Bloomberg's agency broker, Bloomberg Tradebook, in 2001 as a senior analyst, and was named Director of Trading Research and Strategy in 2004. Gary became Chief Strategy Officer in 2007.

Prior to Bloomberg Tradebook, Gary was vice president of business development and the acting CFO for Multicast Media Network, Inc. He also served as vice president and senior trader on a variety of trading desks at (BNP) Paribas Corporation, including its proprietary trading desk. He began his career as an economist in the domestic research group, and a trader, on the Open Market Trading Desk of the Federal Reserve Bank of New York.

Gary holds a Master of Science in Cybersecurity Technology from the University of Maryland Global Campus, a Master of Business Administration in Finance and International Business from the Stern School of Business at New York University and a Bachelor of Arts in Computer Sciences: Mathematics and Economics from the University of Rochester.



Ed Hosty

**Senior Director of Execution Services
Robinhood Securities**

Ed Hosty is Senior Director of Execution Services at Robinhood Securities. In this role he oversees equities and options routing and execution, best execution, and new trading initiatives for the firm. Prior to joining Robinhood in 2021, Ed spent six years at Wolverine Securities as Head of Equity Wholesale Market Making, providing execution services to retail broker-dealers. Prior to that he spent seven years at E*TRADE, first as manager of Order Management and Execution Quality at E*TRADE Securities, followed by a role as Director of Execution Strategy and Analysis for their market making broker-dealer, G1 Execution Services. He holds an MBA in Analytic Finance from the University of Chicago Booth School of Business and a bachelor's degree from the University of Illinois.





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A pattern of several clock faces is visible in the background, each with a small 'C' on its face. A thick green diagonal line runs across the middle of the image, separating the top text from the bottom text.

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Raymond James and Associates

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James Augustyn, S3

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Daniel Seidenstein, MCAP LLC
Brett Macleod, Abel Noser Solutions

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Ryan Kwiatkowski, StoneX Financial Inc.
Michael Post, BXS
Frances Proctor, Truist Bank
Allen Spence, Alpaca



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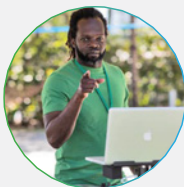
42nd ANNUAL CONFERENCE

STA FLORIDA ENTERTAINMENT

DJ Dhave, Resident DJ

For over 20 years, David Luckain has cemented his reputation as an elite DJ by being one of the select few able to take audiences worldwide on a sonic journey through jazz, disco, rock, reggae, pop, hip-hop and many other genres of music.

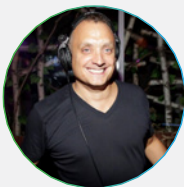
Professionalism being his primary asset second only to integrity, his eloquence extends well beyond the music he plays, as many fans have become friends through the shared experience of pleasant revelry. Specializing in weddings, corporate events, birthdays, and anniversaries, take the worry out of your day by hiring your best DJ!



DJ Double S, Guest DJ

New York City's own DJ Double S (Stephen Seidita) has been a resident spinning in almost all the major clubs and lounges in New York. He has also toured and spun in Las Vegas, Miami, Los Angeles, Chicago, Atlanta, Cancun, Toronto, Montreal, and Madrid.

He is one of our own industry members as a Managing Director of Institutional Equity Trading for Siebert Williams Shank & Co., LLC. He will also be providing the entertainment at the upcoming Security Traders Association of New York (STANY) Annual Conference in March at the New York Stock Exchange.

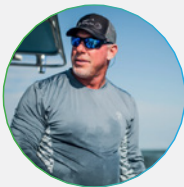


FISHING CAPTAIN

Capt. Michael Anderson, Reel Animals INC

Capt. Michael Anderson has been fishing and competing in tournaments on Tampa Bay and Florida waters for over 25 years. Born and raised in central Wisconsin Capt. Mike joined the U.S. Air Force in 1986 and served almost 7 years before getting out and settling in the Tampa Bay area. He has been guiding on the west coast of Florida for over 20 years and specializes in back country fishing for Tarpon, Snook, Redfish and Trout.

He is the Host of Reel Animals Saturday on AM970 WFLA radio in Tampa from 6 to 8 a.m. every Saturday morning and the Co-Host of the TA Mahoney Co. Reel Animals Radio show on AM620 WDAE in Tampa on Sunday mornings from 7 to 9 a.m. Capt. Mike has been doing fish radio for over 20 years. Captain Mike is also the Host of the Reel Animals Fishing Show TV version which airs in 60 million households nationally in Sportsman Channel, World Fishing Network, Balley Sun Sports, and MOR-Tampa.





Security Traders Association of Florida

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Whiskey & War Stories

Robert W. Schaefer

American Freedom Distillery

Robert W. Schaefer is a retired U.S. Army Special Forces officer (Green Beret), diplomat, and entrepreneur with over 30 years' experience advising heads of state, senior foreign defense officials, and business leaders. He served as the on-air Security Analyst for NBC's official coverage of the 2014 Olympic Games and is a critically acclaimed, award-winning author. Rob is an original member/owner of the American Freedom Distillery team, maker of Horse Soldier Bourbon, one of America's fastest growing spirits. He serves as a Horse Soldier Ambassador for the brand, traveling around the country educating and introducing consumers to the bourbon. Prior to entering the public sector, LTC(R) Schaefer served and participated in virtually every U.S. overseas operation since 1990. He began his career as a Special Forces Engineering and Demolitions Sergeant before earning his commission in 1993. He is one of a handful of "double-sewn" Green Berets, having successfully completed the entire Special Forces course a second time as an officer.

As a Special Operations Officer, Rob was awarded the Singlaub Award as US Special Operations Command (SOCOM) and the Central Intelligence Agency's (CIA) "Person of the Year" for his historic achievements with Russian Airborne Forces. He is the first documented U.S. officer in history to lead Russian forces in combat operations.

As a primary planner of the first unclassified mission of the War On Terror following 9-11, his Program of Instruction (POI) for counterterrorism and counterinsurgency was adopted as the standard for all future deployments by all U.S. Army Special Forces. He later served as the Chief of Central and South Asia Branch of International Military Affairs, overseeing the development and implementation of security assistance and engagement programs for two continents.

He served in multiple diplomatic postings in Russia, Ukraine and most recently as the Military Attaché to the country of Estonia where he helped create Estonian Special Forces and their Cyber Security Command. He was awarded the Estonian Defense Forces Distinguished Service Cross, the Ministry of Defense's Cross of Merit, and the White Cross of the Estonian Kaitseliit – the only foreigner in contemporary Estonian history to have been decorated by all three organizations. Rob earned his Master's Degree from Harvard University and is an inaugural member of the University of Louisville's ROTC Hall of Fame (undergrad).

His book *The Insurgency in Chechnya and the North Caucasus*, From Gazavat to Jihad, won critical acclaim from the New York Times and The Economist, and was named a "Best of 2011" by Kirkus Reviews. He was the host of National Public Radio's Memorial Day Special 2007-2013, and also serves on the Board of Directors for the DaVinci International Film Festival.

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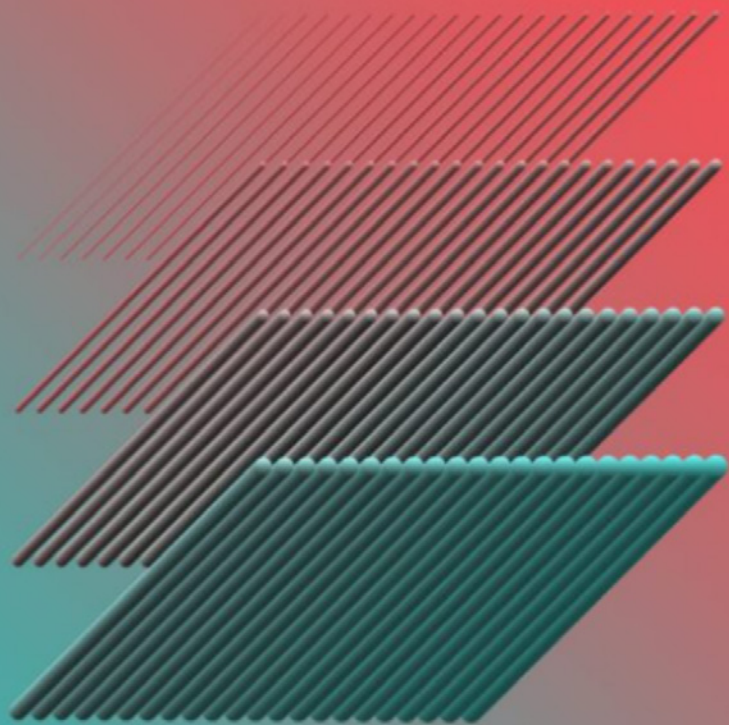
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