First Trust

CFA SOCIETIES WEBEX

First Trust Economic Update and Target Outcome ETFs

DATE/TIME

Thursday | April 9

11:00 am – 12:00 pm CDT

WEBEX

Click Here for WebEx

Q&A will follow WebEx.

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AUDIO

Phone Number | 415-655-0003

Passcode | 802 322 030

Lines are open 15 minutes prior to the WebEx.

HOSTED BY

Brock Ullrich

Senior Vice President

Institutional Investments | First Trust

FEATURED SPEAKERS

ANDREW OPDYKE, CFA

Economist | First Trust

Andrew is an Economist and a member of the First Trust Economics Team that Bloomberg has ranked as one of the top forecasters of the U.S. economy over the past several years.

At First Trust, Andrew is responsible for analyzing economic indicators, writing economic commentaries and producing articles on the First Trust Economics Blog. Out of a panel of over 100 economists, investment strategists, and housing market analysts, the First Trust Economics Team was awarded the “Crystal Ball Award” by Zillow® in partnership with Pulsenomics in 2012, 2013, 2014, and again most recently in 2015 for accurate home price predictions. Cogent’s 2017 Survey of Advisors rated First Trust’s thought leadership material as number one for most read and most shared by advisors with colleagues or clients.*

Andrew received an MBA from Northwestern University’s Kellogg Graduate School of Management and a BA in Business and Economics from Hope College. He holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute and the CFA Society of Chicago.

JEFF CHANG, CFA

COO & Managing Director, Head of Product Management
Cboe Vest Financial LLC

Jeff Chang has over 17 years of experience in financial services and asset management, and is responsible for driving product strategy, research and positioning of the firm's product offerings across all distribution and marketing channels.

Prior to co-founding Cboe Vest in 2012, Mr. Chang worked at ProShares, where he was responsible for investment research and product management.

Previously, Mr. Chang worked at FBR & Co., a middle market investment bank. Mr. Chang’s primary focus was FBR’s trading platform, which included equity, high yield, convertible securities, listed options and mortgage trading. He has also worked at Freddie Mac and the World Bank.

Mr. Chang is a CFA charterholder, an instructor for the CFA review for Kaplan Schweser, and a CPA review instructor for Becker Professional Education. He has also held CPA and CFE certifications. Mr. Chang attended the United States Naval Academy and the McDonough School of Business at Georgetown University.

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You should consider a portfolio's investment objectives, risks, and charges and expenses carefully before investing. Contact First Trust Portfolios L.P. at 1-800-621-1675 or visit www.ftportfolios.com to obtain a prospectus or summary prospectus, if available which contains this and other information about a portfolio. The prospectus or summary prospectus should be read carefully before investing.

*Cogent Reports conducted an online survey of a representative cross section of 1,078 advisors in April through June 2017. Survey participants were required to have an active book of business of at least $5 million and offer investment advice or planning services to individual investors on a fee or transactional basis.