8:10 a.m. Registration and continental breakfast
8:50 Welcome
8:55 Jason DeSena Trennert, “Requiem for the new normal.”
9:35 Craig Moffett, “AT&T and the audacity of debt.”
10:20 15-minute break
10:30 Anthony Deden, “Investment value in an age of booms and busts: A reassessment.”
11:10 Stanley Druckenmiller in conversation with James Grant
12:05 p.m. Luncheon
1:10 William Ackman, “A new idea.”
2:00 Francine McKenna, “Ignoring the fundamentals: How alternative accounting leads to market self-delusion.”
2:40 Logan Wright, “China’s credit crunch: Deleveraging and risks to financial resilience.”
3:20 15-minute break
4:15 James Bianco, “Regime change: How the relationship between stocks and bonds is changing.”
4:55 Champagne toast to the readers of Grant’s
5:00 Reception and music by Toby Williams