



3EDGE
ASSET MANAGEMENT

3EDGE

ADVISOR SUMMIT

Boston, MA
April 29-30, 2026



A Message from Fritz Folts *3EDGE Chief Investment Strategist*

We are delighted to welcome you to the first-ever **3EDGE Asset Management Advisor Summit!** It is a privilege to bring together such an accomplished and diverse group of financial professionals, and we are grateful you chose to spend your time with us.

The independent advisor community is foundational to our work and essential to our mission. We are proud of the work we do together to grow and protect clients' hard-earned wealth and help them achieve their financial and life goals.

Our program over the next two days has been carefully curated in an effort to provide you with meaningful insights, engaging dialogue, and valuable opportunities you can carry forward in your work. Thank you for joining us here in Boston, and we hope you return home revived in your mission.

Most Sincerely,

DeFred G. Folts III

In this program, you will find the full agenda for both days of our Advisor Summit.

For ease of reference, we have provided supplemental information including:

- ◆ *Information on The Atlas Hotel*
- ◆ *An overview of our extracurricular locations*
- ◆ *Sightseeing recommendations from our resident Bostonians*
- ◆ *Short biographies for our featured guest speakers*
- ◆ *A guide to 3EDGE hosts and other team members in attendance*



The 3EDGE 2026 Advisor Summit is proudly hosted at

THE ATLAS HOTEL

40 Western Ave | Boston, MA 02134

While Boston is one of the most walkable cities in the U.S., *we recommend taking a taxi, rideshare, or other car service to the Atlas Hotel upon your arrival at Logan International Airport.* The trip will be a ~20 minute drive westbound along Interstate 90.

From the Atlas, Cambridge and Boston sit within easy reach. Rideshare services are abundant throughout the city. The closest MBTA subway stops - the "T" as we call it - are **Harvard Square** and **Central Station**, both on the Red Line. Take the southbound Ashmont or Braintree train for a quick visit downtown.

Hotel Check-In: 4:00 PM **Check-Out:** 11:00 AM



Agenda: Wednesday, April 29 | Day 1

Atlas Hotel - Meridian Room

8:00 AM - 8:45 AM	Networking Breakfast
8:45 AM - 9:00 AM	Greetings & Welcome Announcements Fritz Folts - Chief Investment Strategist 3EDGE Monica Chandra - President 3EDGE
9:00 AM - 9:45 AM	The Story of 3EDGE Steve Cucchiaro - CEO & CIO 3EDGE <i>An overview of the history and the evolution of 3EDGE Asset Management, and what makes our philosophy and investment process unique.</i> <i>Co-hosted by Fritz Folts.</i>
9:45 AM - 10:30 AM	3EDGE Model 101 Eric Biegeleisen - Deputy CIO 3EDGE Bob Phillips - Chief Technology Officer 3EDGE <i>A deep dive into the 3EDGE Proprietary Research Model of the Global Capital Markets.</i>
10:30 AM - 10:45 AM	Networking Coffee Break
10:45 AM - 11:30 AM	3EDGE Trading in the ETF Ecosystem Lawrence Jules - Head Trader 3EDGE Frank LaMar - Director of Capital Markets 3EDGE <i>A review of effective trading strategies in the ETF ecosystem.</i>
11:45 AM - 12:30 PM	Roundtable Discussions
12:15 PM - 1:15 PM	Luncheon

Agenda: Wednesday, April 29 | Day 1

Atlas Hotel - Meridian Room

1:15 PM - 2:00 PM

How to Do More for the Core Portfolio **Guest Speaker Nicholas Koutsoftas**

Vice President, Sector ETF Specialist
State Street Investment Management
Co-hosted by Eric Biegeleisen.

2:00 PM - 3:00 PM

Fidelity's Time Value Equation **Guest Speakers Edward Hurwitch** **& Maeve Dyer**

Fidelity Investments

3:15 PM

Short walk to Harvard Business School

3:30 PM - 5:00 PM

Guided tour of HBS Baker Library

5:00 PM

Return to Atlas Hotel

6:30 PM - 8:30 PM

Dinner at Scampo

*The Liberty Hotel, site of the
historic Charles Street Jail.*

Group shuttle departs hotel at 6:00 PM



Agenda: Thursday, April 30 | Day 2

Atlas Hotel - Meridian Room

- 8:30 AM - 9:15 AM Networking Breakfast
- 9:15 AM - 10:00 AM **Introduction to 3EDGE Model Consulting**
Eric Biegeleisen - Deputy CIO | 3EDGE
- 10:00 AM - 10:45 AM **3EDGE Global Capital Markets Outlook**
Steve Cucchiaro - CEO & CIO | 3EDGE
Fritz Folts - Chief Investment Strategist | 3EDGE
- 10:45 AM - 11:00 AM Networking Coffee Break
- 11:00 AM - 11:45 AM **Artificial Intelligence & Investing**
Dr. Robert Phillips - Chief Technology Officer | 3EDGE
How 3EDGE is leveraging AI in an evolving landscape.
- 11:45 AM - 12:15 PM Luncheon
- 12:15 PM - 1:15 PM **Keynote Speaker:**
Ranjay Gulati - Paul R. Lawrence Professor of Administration | Harvard Business School
How to Be Bold: The Surprising Science of Everyday Courage
Professor Gulati's pathbreaking research focuses on unlocking organizational and human potential. How winning companies - those that prosper both in good times and bad - drive growth and prosperity. His recent work explores leadership and strategic challenges for building high growth organizations in turbulent times.

About Our Speakers

Biographies of our featured guests in order of session schedule



Session: Day 1
1:15 - 2:00 PM

Nicholas Koutsoftas

*Vice President, Sector ETF Specialist
State Street Investment Management*

Nicholas Koutsoftas is a financial professional with State Street Investment Management, affiliated with State Street Global Advisors Funds Distributors, LLC, where he supports clients across investment solutions. He brings deep experience in commodities and real assets, including prior roles as a commodities portfolio manager at Cohen & Steers and a vice president at GE Asset Management. Nick holds an MBA from NYU Stern School of Business and a bachelor's degree from the University of Massachusetts. He is FINRA-registered and has passed the SIE, Series 7, and Series 63 examinations.



Edward (Ned) Hurwitsch

*Director, Business Consultant
Fidelity Investments*

Ned Hurwitsch is a director and business consultant for Institutional Wealth Management Services at Fidelity Investments, where he helps wealth management professionals to better serve clients and grow their businesses. Mr. Hurwitsch holds a B.S. in economics from Trinity College and maintains FINRA Series 7 and 63 licenses.



Session: Day 1
2:00 - 3:00 PM

Maevae Dyer

*Senior Manager, Business Consulting
Fidelity Investments*

Dyer is a senior manager and business consultant for Institutional Wealth Management Services. In this role, Ms. Dyer works with registered investment advisors (RIAs) and broker dealers on business strategy, leveraging data-driven insights to support sustainable growth and stronger firm performance. Ms. Dyer earned her B.A. degree in Political Science from Boston College. She also holds the Financial Industry Regulatory Authority (FINRA) Series licenses 7 and 63.



Session: Day 2
12:15 - 1:15 PM

Professor Ranjay Gulati

*Paul R. Lawrence MBA Class of 1942 Professor of Business Administration
Harvard Business School*

Ranjay Gulati is the Paul R. Lawrence MBA Class of 1942 Professor of Business Administration at Harvard Business School and a former leader of its Organizational Behavior Unit, known for influential research on leadership and building resilient, high-growth organizations. His work bridges theory and practice, earning him the 2024 CK Prahalad Award for Scholarly Impact on Practice and recognition as one of the most cited and practice-relevant scholars in business. A prolific author, his books include *How to Be Bold* (2025), *Deep Purpose* (2022), and *Reorganize for Resilience* (2009). Professor Gulati holds degrees from Harvard, MIT Sloan, and Washington State University.

Guide to Boston

Cultural highlights from the Boston-based 3EDGE team

We are excited to welcome you to the Cradle of Liberty and a major hub for history, education, finance, medicine and biotechnology! If you have free time before or after the Advisor Summit, here are just a few classic Boston landmarks and cultural staples you may consider checking out during your visit.

Attractions & Sightseeing:

Walk the Freedom Trail (thefreedomtrail.org)

A red-brick self-guided tour route through downtown that connects many of the city's most historic sites (Boston Common, Faneuil Hall, Paul Revere House, Old North Church, and more).

Faneuil Hall & Quincy Market (faneuilhallmarketplace.com)

A lively, central stop for quick bites, shopping, and people-watching.

Boston Tea Party Ships & Museum (bostonteatartyship.com)

An interactive museum experience on the waterfront with live reenactments and replica ships tied to the 1773 Boston Tea Party.

Beacon Hill / Cheers / Boston Common

Among Boston's oldest neighborhoods, often compared to Old London, and home to Cheers, a must-stop for fans of the hit TV show. Cheers is located across from Boston Common, the first public park in America, which itself is great for a stroll.

Museum of Fine Arts (MFA) (mfa.org)

One of the largest art museums in the U.S., with a massive historic collection.

Isabella Stewart Gardner Museum (gardnermuseum.org)

A one-of-a-kind museum set around a beautiful indoor courtyard. Widely known for the largest unsolved art theft in history in 1990, where 13 works were stolen, including masterpieces by Rembrandt and Vermeer.

Fenway Park (mlb.com/redsox/ballpark/tours)

The legendary sports venue needs no introduction. If you're a baseball fan, consider taking some time to visit and attend a tour.

Guide to Boston

Dining recommendations from the Boston-based 3EDGE team

Not to be outdone on the culinary scene, Boston is also home to an incredible eclectic variety of dining options. There's so much more to explore beyond the stereotypical clam chowder - though don't pass up the opportunity to try that, too!

Dining Recommendations:

Cambridge / Harvard Square

Close to the Atlas Hotel, with an energetic mix of trendy options and local favorites; easy to combine with a campus walk. Popular picks include **Alden & Harlow**, **Harvest**, and **Tatte Bakery & Cafe**.

Back Bay

A convenient shopping strip along **Newbury Street** with plenty of sit-down options ranging from casual to fine dining. Popular picks include **Atlantic Fish Co.**, **Saltie Girl**, and **Stephanie's on Newbury**.

North End (Italian)

Boston's classic Italian neighborhood; great for pasta, seafood, and dessert. Popular spots include **Giacomo's**, **Mamma Maria**, and several pastry stops along **Hanover Street**.

Beacon Hill / Downtown

Cozy streets and convenient choices near historic sites and hotels; easy to pair with a Freedom Trail walk. Popular picks include **75 Chestnut**, **Bleu** (theater district), and **Mariel** (financial district).

Seaport

Modern waterfront dining with lots of seafood and contemporary American options; particularly lively in the evenings. Popular picks include **Row 34**, **Legal Sea Foods-Harborside**, and **Woods Hill Pier 4**.

A Sampling of Boston's History

Harvard Business School's Baker Library

Baker Library is the architectural and intellectual centerpiece of Harvard Business School's campus. Dedicated in 1927 and designed by McKim, Mead & White, it was named for banker George F. Baker, the school's first major benefactor and the donor who helped fund the original HBS campus. Over time, the library grew beyond its role as a traditional academic library to become a major center for business history, archives, and special collections, with holdings that document the development of Harvard Business School, the case method, and centuries of commercial and industrial history. Today, Baker Library remains a core research resource for the HBS community and outside scholars studying business, management, and economic history.



Scampo, the Liberty Hotel, & the former Charles Street Jail



Scampo is a Beacon Hill restaurant created by James Beard Award-winning chef Lydia Shire and located inside the Liberty Hotel, giving it an unusual setting inside one of the city's best-known historic conversions. The Liberty Hotel occupies the former Charles Street Jail, a granite structure completed in 1851 that housed prisoners for well over a century and later became known for holding several notable inmates and for episodes tied to Boston's broader social and political history, including the imprisonment of suffrage protesters. After the jail ceased operating and its last prisoners were transferred in 1990, the landmark was redeveloped into a luxury hotel that preserved major architectural elements of the old prison, while Scampo became part of its new identity by pairing contemporary dining with the building's layered past.

Meet the 3EDGE Team



Stephen Cucchiaro
CEO & Chief Investment Officer



Jonathan Cressy
Head of Sales



Defred "Fritz" Folts
Chief Investment Strategist



Robert Phillips, PhD
Chief Technology Officer



Monica Chandra
President



Eric Biegeleisen, CFA®
Deputy Chief Investment Officer



Lawrence Jules
Head Trader

The 3EDGE Advisor Summit speakers are joined by fellow team members:

Ryan Connolly *Regional Director*
Tomas Giardino *Regional Director*
Austin Haughton *Marketing Manager*
Kevin Kenny *Regional Director*
Ashley Koed *Head of Operations*

Frank LaMar *Director of Capital Markets*
Kristi McDermott *Chief Compliance Officer*
Peter McManus *Retirement Account Specialist*
Brooke Miller *Snr. Assoc., Administration*



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