

Here is a list of companies for which I have been paid to consult and/or give presentations. (September 5, 2022)

EMPIRICUS São Paulo

Amundi Paris

Matson Money

Bank of Belgium

Next Gen Personal Finance, San Francisco

Research Affiliates Advisor, Newport Beach

Portfolio Construction Forum, Sydney,

B|O|S, San Francisco

UBS

Morningstar

CFA Institute

Salone del Risparmio, Milan

Thinking Ahead Institute, New York

BlackRock

19/19 Investment Counsel, Baltimore,

Bloomberg

Pioneer Global Investments

Private Asset Liaisons Group, San Francisco

Institute for Private Investors, San Francisco

American Institute of CPAs

Dodge and Cox, San Francisco

Dimensional Fund Advisors

Anima, Milan

IMCA

Benefits Canada

Matthews International Capital Management

Borsa İstanbul

ITAM

Pensions & Investments

Ascend Capital Management

Thrivent Investment Management, Minneapolis,

International Association of Credit Portfolio Managers, New York

SKAGEN Funds, Stravanger, Norway

S.W. Mitchell Capital

Woodruff-Sawyer Inc.

Russell Investments

Capital Group

Lasecke Weil Wealth Advisory Group

Sinopia Asset Management, Paris

Mackenzie Investments

Barclays Global Investors

Gerson Lehrman Group,

Alliance Bernstein

Financial Planning Association

Franklin Templeton Investments

Orkla Finans, Oslo

Merrill Lynch  
Edward Jones  
New York Private Equity Network  
Wellington Investments  
Wells Fargo  
Fidelity  
Citigroup Smith Barney  
Rockbay Capital Management  
Consulting Services Support Corporation, La Jolla  
BSI/Gamma Foundation, Zurich  
Gutmann Center, Vienna  
Delahaye IABC Research  
Taiwan Academy of Banking and Finance and National Science Council, Taipei  
Morgan Stanley  
World Presidents Organization  
Mistui Life  
Family Office Exchange  
Eaton Vance  
Paul Capital Partners  
Google  
Mutual Service Corporation  
Mercer  
Legg Mason Funds  
RSM McGladrey  
Gothaer Insurance  
AIMR  
Institutional Investor  
CBOE, CBOT, & CME  
Lyon Schwabacher Group, San Francisco  
AARP  
Pershing Financial Products and Services  
Schwab  
Fuller Thaler Asset Management  
Mellon Capital Management  
Prudential Investments  
Wealth Planning Institute  
L.A. Times  
IIR London  
Paine Webber  
SEI  
BARRA  
Plexus Group  
Goldman Sachs  
New England Financial