



The Energy Opportunity

September 10, 2015 at 6 PM
Boston, MA

Following the dislocation in energy over the last year, there has been widespread agreement that lower prices lay ahead. What does this mean going forward? We argue this makes the opportunity set for investing attractive on both the long and short side. Our conversation will be led by Dan Rice and Greg LeBlanc, two very senior investors in the energy space. Join us for a very timely discussion as we debate the current landscape as well as long term and short term implications to the energy space.

Participants

Gregory LeBlanc, CFA, Wellington Management

Dan Rice, GRT Capital Partners

Scott Mackey, CPA, Moderator, MacGladrey

Event Details

Date: September 10, 2015

Time: 5:30 PM Registration.

We will begin *promptly* at 6 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Host: McGladrey

Location: 80 City Square, Charlestown, **Boston**, MA 02129 - [Directions](#)

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [Boston](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission is free, but there is a \$25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to 100WHF Foundation - Celebrating Education/Investing in the Next Generation initiative, the 2015 beneficiary of 100WHF's US philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

Biographies

Gregory LeBlanc, CFA, Portfolio Manager, Wellington Management

Greg is responsible for managing energy and commodity portfolios for institutional investors worldwide. He is portfolio manager for long-only institutional accounts in the energy sector, responsible for managing energy sub-portfolios in the firm's research-based investment accounts, and portfolio manager of an energy hedge fund. In addition he is a co-portfolio manager for several commodity portfolios.

Prior to his current role, Greg was an equity team analyst, working on the long-only and hedge fund accounts dedicated to the energy sector, where he gained expertise in the oil and gas investing (1998). He joined Wellington Management in 1995 as a trade administrator on the US Equity Trading Desk. Prior to joining the firm, Greg worked at State Street Bank & Trust as a manager of Custody and Accounting Operations (1992 - 1995).

Greg received his BA in economics from Bates College (1992). He also holds the Chartered Financial Analyst designation

Dan Rice, Portfolio Manager, GRT Capital Partners

Daniel J. Rice III is a Portfolio Manager and leads the Energy Team in the firm. He is primarily involved in the management of accounts that follow the Energy strategies and has been involved with investment management and research since 1979. He joined the Investment Manager in December, 2012. From 2005 to 2012 he was a Managing Director of BlackRock, Inc. and was a portfolio manager of the BlackRock All-Cap Energy & Resources Portfolio and the BlackRock Energy & Resources Portfolio. The two portfolios had combined assets of over \$1.9 billion as of March 31, 2012 and were managed by a team of portfolio managers responsible for the day-to-day management of the portfolios. At BlackRock, Inc., Mr. Rice was also responsible for the management of other pooled investment vehicles and accounts with an aggregate value of more than \$2.5 billion. From 1990 to 2005, he was a Senior Vice President of State Street Research & Management Company where he also managed mutual fund and other institutional assets.

Dan holds a BS from Bates College (1973) and an MBA from New York University (1975). In addition, he is a Director of Rice Energy, Inc.

Scott Mackey, CPA, Partner, McGladrey

Scott is a partner and leader of the Financial Services practice in New England. He is responsible for all aspects of our delivery of assurance, taxation, risk advisory and IT consulting services to the New England asset management and financial services sector.

Scott brings more than 17 years of public accounting experience to McGladrey. He has extensive experience across the financial services and asset management industry, having served both the alternative investment space, including hedge fund, private equity and fund of fund complexes, where he gained exposure to hard to value securities and complex financial instruments, registered investment vehicles including mutual funds and broker-dealers. In addition, Scott has significant insights on operational and regulatory issues facing asset managers through the performance of internal control reports, such as Soc1 and Chief Compliance Officer reports, as well as advisory and risk management projects.

Prior to McGladrey, Scott spent 9 years in Ernst & Young's (E&Y) asset management practice, performing a wide array of services to their alternative investment, registered investment company, custodial banking and broker-dealer clients. Prior to E&Y, he was a manager at Arthur Andersen.

He earned his MS in accounting from the University of Massachusetts and he earned his BS in accounting from University of Tasmania, Australia.



About McGladrey

McGladrey LLP, a licensed CPA firm, is the nation's leading provider of assurance, tax and consulting services focused on the middle market. With more than 7,000 professionals in 75 U.S. cities and access to more than 32,000 people in 100 countries through our membership in RSM International, we can meet your needs wherever in the world you do business.

McGladrey has more than 50 years of experience serving the financial services community in key financial hubs. Our professionals help organizations navigate complex reporting, governance and regulatory issues to achieve their business objectives. Based on the knowledge that comes from serving alternative investment companies, investment advisers, investment partnerships/hedge funds, private equity funds, BDC's, mutual funds, broker-dealers and futures commission merchants, we understand the complex operational, financial reporting and compliance issues facing the industry. We also offer registration and independent testing services to meet FINRA/SEC and CFTC obligations, while providing GIPS verification, product and technology due diligence and risk assessments.

McGladrey provides industry insight, advice and solutions to financial services organizations across the country and around the world. That's what you can expect from McGladrey. Experience the Power of Being Understood.

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