



# MIKE ROSS

Portfolio Manager &  
Public Speaker

## CONTACT

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## SPEAKING TOPICS

- **The False Hope of Global Diversification: Why Investing Internationally IS NOT In Your Client's Best Interests**
- **Keeping Clients Invested In Bear Markets: Tips From Almost 40 years In The Trenches**
- **Familiarity Bias Is Your Friend**
- **Fighting Fee Minimization Pressures Using The Tax Code**

## OUTCOMES

- **Confident Client Conversations**
- **Crisis-Proof Talking Points**
- **Retention Through Familiarity**
- **Powerful Fee Justifications**
- **Simplified Client Processes**

### **Option 1:**

Our next speaker brings more than 40 years of real-world financial experience to the stage.

Michael Ross has managed over half a billion dollars in client assets, guided investors through six major bear markets, and co-founded the Academy of Certified Portfolio Managers, where he's helped shape the standards many advisors rely on today.

He's known for cutting through industry noise and delivering practical, actionable insights that empower financial professionals to make better decisions for their clients.

Please join me in welcoming Michael Ross.

### **Option 2:**

Get ready for a speaker who tells the truth about the markets – not the version you find in textbooks, but the version shaped by four decades on the front lines.

Michael Ross is a veteran portfolio strategist, the co-founder of the Academy of Certified Portfolio Managers, and a trusted advisor to financial professionals nationwide. He's navigated six bear markets, managed hundreds of millions in assets, and built a reputation for challenging assumptions, simplifying complexity, and giving advisors tools they can put to work immediately.

Please help me welcome the one and only Michael Ross!

### **Option 3:**

What happens when a financial professional with 40+ years of battle-tested experience steps onstage to challenge everything you think you know about markets, clients, and portfolio design?

You get Michael Ross.

Michael has managed over half a billion dollars through multiple market cycles, co-founded the Academy of Certified Portfolio Managers, and trained countless advisors to look beyond conventional wisdom. His insights on behavioral finance, risk management, and investor psychology have reshaped how advisors approach their work – and today he's here to do the same for you.

Please join me in welcoming Michael Ross.