

12th Annual Investment Forum

Bermuda

Thursday, September 24, 2026 - Sunday, September 27, 2026



Dan Clifton

Head of Policy Research
Strategas

Steve Boyes

Conservation Biologist and
National Geographic Explorer

Thursday, September 24, 2026

06:30 PM to 09:30 PM
Harrington Terrace

Welcome Cocktails & Dinner

Friday, September 25, 2026

07:15 AM to 08:00 AM
Soncy/Chelston Rooms

Breakfast

08:00 AM to 08:45 AM

Policy & Election Outlook

- **Dan Clifton**
Head of Policy Research
Strategas

08:45 AM to 09:00 AM

Break

09:00 AM to 11:15 AM

Investment Roundtable I

Jason De Sena Trennert, Nicholas Bohnsack and Chris Verrone

11:30 AM to 12:00 PM

Strategas Roundtable I with Don Rissmiller and Tom Tzitzouris

12:30 PM to 04:30 PM
Various locations

Group Activities

Golf, jetskiing, yacht trip or group lunch with Don Rissmiller.

06:45 PM to 09:45 PM

Group Dinner: The Last Wilderness

- The Croquet Lawn
- **Steve Boyes**
Conservation Biologist and National Geographic Explorer

Saturday, September 26, 2026

07:15 AM to 08:00 AM

Soncy/Chelston Rooms

Breakfast

08:00 AM to 08:45 AM

To Be Announced

08:45 AM to 09:00 AM

Break

09:00 AM to 11:15 AM

Investment Roundtable II

11:15 AM to 11:30 AM

Break

11:30 AM to 12:15 PM

Strategas Roundtable II with Jason De Sena Trennert, Nicholas Bohnsack & Chris Verrone

06:30 PM to 09:30 PM

Social Dinner & Drinks

Sul Verde at the Rosewood Golf Club

Sunday, September 27, 2026

07:00 AM to 05:00 PM

Various Times

Depart

SPEAKERS

Steve

Steve Boyes

Conservation Biologist and National Geographic Explorer

Conservationist, *National Geographic* Explorer, Rolex Perpetual Planet Ambassador, TED speaker, and Senior Fellow, Dr. Steve Boyes has dedicated his life to preserving Africa's wilderness areas and the species that depend upon them. His work has taken him all over Africa – studying wildlife rehabilitation and biodiversity, fighting the wild-caught bird trade, planting thousands of trees in forest restoration projects, working to bring Africa's most endangered parrot species back from the brink of extinction, and working to preserve and protect Botswana's uniquely pristine Okavango Delta and the vast Angolan watersheds. These are some of Africa's last untouched, unpopulated wilderness.

In 2015, Boyes launched the National Geographic Okavango Wilderness Project (NGOWP) to promote broader protection for the Okavango Delta's watershed and its wildlife. By December 2018, they had signed a 5-year Protocol of Cooperation with the Angolan government, mandating the protection of the Okavango-Zambezi Water Tower by supporting the creation of a vast system of protected areas. Boyes' documentary, *Into the Okavango*, follows his journey to explore the Angolan highlands and is featured on Amazon Prime and iTunes. Honored for the scientific significance of their work, the Okavango Wilderness Project team won the 2019 Rolex National Geographic Explorer of the Year award. He now runs the Great Spine of Africa Series of Expeditions with Rolex's Perpetual Planet Initiative, exploring miles of rivers never scientifically documented before.

The Road to Conservation. Boyes' passion has always been wilderness. "Wilderness cannot be restored or recreated, only destroyed," he says. "We are about to lose our last glimpses into pre-history." He leads NGOWP's expeditions into the vast Okavango Delta in a quest to preserve its rich biodiversity, which he believes is the key to maintaining our environment, quality of life, and connection to the planet. Since 2015, they have completed 11 ambitious multiyear expeditions covering over 6,000 miles self-propelled on dug-out canoes, on fat-tire mountain bikes, and on foot. Boyes' "megatransects" into the heart of delta and the remotest corners of the Okavango, Kwando, and Zambezi River Basins, allowing his team to benchmark the current state of these remote, intact wildernesses against future changes, using birds, fish, and frogs, and guides. There, he is a rare, privileged visitor.

For each of ten mokoro expeditions across the Okavango Delta, Boyes entered Wayeyi territory barefoot, unarmed, and with only the food they could carry for three weeks at a time — but now, in the 21st century, with pounds of high-tech equipment including cameras, computers, batteries, and solar panels, he conducts his research and offers real-time data online with the public. His blogs bring the exotic landscapes and birds he loves to millions who may never see them in person, raising awareness, political action, media attention, and funds for preservation, and "sharing the experience with people around the world to convince them to protect a place they'll never visit."

A native of South Africa, Boyes founded the Wild Bird Trust in 2010 to support the Cape Parrot Project and the Okavango Wetland Bird Survey that same year. The Wild Bird Trust has grown to a group of organizations across four countries, managing one of the biggest conservation opportunities in Africa in decades. His passion is contagious and he has conducted seminars and talks at the Universities of Oxford, Cambridge, California (Berkeley), and Colorado (Boulder), as well as at the Bronx Zoo and several local and international conferences.



Dan Clifton

Head of Policy Research
Strategas

Daniel Clifton is a Partner and Head of Policy Research for Strategas Securities. In this capacity, Mr. Clifton evaluates the financial market implications of policy and political developments. This includes analyzing tax, trade, infrastructure, healthcare, energy, defense and other policy initiatives to determine how public policy changes impact the economy and financial markets for institutional investors.

Daniel leads Strategas' Washington policy research team, which is the #1 ranked Washington policy team on Wall Street, according to *Institutional Investor (II)*. Dan and his team have been ranked as one of the top Washington policy teams in each of the past 16 years. Mr. Clifton is also a top ranked analyst in the category of Accounting and Tax Policy according to the same *II* report.

Mr. Clifton's research on the interaction between policy, elections, and financial markets is widely cited in the media and Daniel is a frequent guest on CNBC, Bloomberg, and Fox Business.

Prior to joining Strategas, Mr. Clifton was Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders. Daniel also worked on tax policy issues prior to the ASA and has been involved in every major tax policy change over the past twenty years. Prior to moving to Washington, Mr. Clifton served as a senior staff member in two gubernatorial administrations working on economic and fiscal policy issues.

Mr. Clifton received both his BA in Urban Planning and his MS in Public Policy from Rutgers University where he was a Fellow at the Eagleton Institute of Politics and a Harold Martin Fellow for Public Policy.

Accommodations

Rosewood Bermuda

To book under the Strategas room block, please reach out to Magnolia Echeverria Flores at magnolia.echeverria@rosewoodhotels.com or +1 441 2984023. The Strategas room block rate is \$675(excluding taxes, resort fee, etc).