Invitation to Virtual Discussion

Remembering Jack Bogle: A Life-and-Legacy Tribute

May 8, 2020 Would Have Been 91st Birthday

Virtual discussion on May 5, 2020 will feature comments from Christine Benz, Chip Roame, Jane Bryant Quinn, Chip Simon, Rick Ferri and Knut Rostad

April 29, 2020 [Washington, D.C.] – Professional journalists and a small group of interested others (special invitations have been extended by the panelists) are invited to join a group of investor advocates and fiduciary leaders for a virtual discussion on May 5, 2020 at 3:00 pm ET.

Organized by the Institute for the Fiduciary Standard, this virtual conversation will bring leading fiduciary voices and investor advocates together to discuss the legacy of John C. "Jack" Bogle. Bogle was the founder and chief executive of The Vanguard Group, and is credited with creating the first index fund. He preached investment over speculation, long term patience over short term action and minimizing investment costs. The ideal investment vehicle for Bogle was a low cost index fund held over a period of a lifetime. Born on May 8, 1929, Bogle would have turned 91 on May 8, 2020. This virtual discussion, will focus on the Vanguard founder's legacy since his passing 16 months ago.

PUBLIC SENTIMENT SURVEY

"On the eve of his 91st birthday on May 8, the legacy of Vanguard founder Jack Bogle, shines through," said Knut Rostad, president of the Institute for the Fiduciary Standard. "Index funds' low costs and diversification for the long term are even more relevant with the uncertainty and volatility of the Coronavirus. Straight talk and commonsense are at a premium, especially right now. Does the Bogle axiom, 'Don't do something, just stand there!' hold true?"

"For my part on the May 5th discussion, I'll be share some of what we learned in a first of its kind public opinion survey of how the investing public and Vanguard investors recall Jack's investing principles and reputation amongst business and finance leaders of his time. The survey was conducted by Rockland Dutton Research for the Friends of Jack Bogle," Rostad said.

IN A NUTSHELL

May 5, 2020 at 3:00 PM ET

A virtual discussion with statements from investor advocate and fiduciary leaders on the life and legacy of John C. "Jack" Bogle.

Everyone attending will be asked to hold all social media posts, blog posts, article publication, audio/video summaries, etc. until Bogle's birthday morning (embargo lifts May 8, 2020 at 7:00 am ET).

Registration link:

https://attendee.gotowebinar.com/register/7697068884601425164

DISCUSSION DETAILS

An array of financial services professionals who knew and watched the Vanguard founder over many years will share their thoughts. Participating on May 5 via GoToMeeting will be:

Christine Benz, director of personal finance, Morningstar, and author of "30-Minute Money Solutions: A Step-by-Step Guide to Managing Your Finances" and the "Morningstar Guide to Mutual Funds: 5-Star Strategies for Success." Benz, who in her role at Morningstar interviewed Bogle on multiple occasions, will serve as the discussion moderator.

Knut Rostad, president of the Institute for the Fiduciary Standard, a nonprofit formed in 2011 to advance the fiduciary standard through research, education and advocacy. Rostad is the editor of "The Man in the Arena: Vanguard Founder John C. Bogle and His Lifelong Battle to Serve Investors First."

Chip Roame, managing partner of Tiburon Strategic Advisors, Managing Partner of the Tiburon Partners Fund, and a leading strategic advisor to CEOs, other senior executives, boards of directors in the banking, insurance brokerage, investment management, and FinTech markets, who at a prior Tiburon CEO Summit presented Bogle a prestigious Tiburon award and subsequently conversed with Bogle on stage. Bogle came back several more times to participate at additional Tiburon CEO Summits.

"Attendees loved him," Roame said. "Many Tiburon members have a Jack story. He had a lot of impact."

Chip Simon, CFP®, principal, Taconic Advisors, who at the Alliance of Comprehensive Planners 2014 Annual Conference sat down with Bogle and had an educational and enlightening question and answer session. Bogle said ACP Planners are on the right side of history. Simon will share some personal observations as a practicing financial advisor.

Rick Ferri, CFA®, Ferri Investment Solutions and a long-time "Boglehead" who is the author of several books on index funds, ETFs, the power of passive investing and asset allocation. He is also the co-editor of the Bogleheads community-authored book "Bogleheads' Guide to Retirement Planning."

Jane Bryant Quinn, one of the nation's leading commentators on personal finance. Her policy columns have addressed matters of top concern to citizens, including investor protection, health insurance, Social Security, and the sufficiency of retirement plans. Her most recent book is "How to Make Your Money Last."

Marie Swift, CEO, Impact Communications, is hosting this virtual discussion and serving as media liaison for this group initiative.

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