



# BROWN



**COE Lecture Series Fall 2007**

**Phoenix Investment Partners, Ltd**

**Join us on Monday, November 26<sup>th</sup>, 2007  
2:00pm in Barus and Holley Room 190**

**Steve Gresham '83  
Executive Vice President  
Phoenix Investment Partners, Ltd.**

### *Abstract*

The global aging phenomenon brings both challenges for business and opportunities for entrepreneurs. Most large companies and industries are managed according to their short-term needs and find themselves vulnerable to larger trends. The inability to adapt tactics to longer-term strategy can undermine even dominant players. Recent examples include the decline of the US based automobile industry and traditional large scale retailing (Sears). Looming crises include the current challenges to Wall Street advice firms being slowly usurped by technology-savvy players such as Fidelity and Schwab.

### *Biosketch*

Steve Gresham is considered one of the financial industry's true pioneers. His ideas and efforts have led to the development of many successful investment products tailored to the growing need for retirement solutions. He began his career in financial services during his Brown undergraduate time – 1980 – and has worked at a number of Wall Street firms in senior leadership positions. He is the author of four books for the financial services industry, including a new title this year, *Advisor for Life*. He is a frequent contributor to industry media, including CNN, Public Broadcasting and the USA Network, as well as authoring several magazine articles and a monthly column. He currently serves as a governor of the Money Management Institute and is a founding director of the International Money Management Institute in London. His Brown degree was in Organizational Behavior and he authored a two semester independent study for which Prof. Hazeltine was his academic advisor.

*Host: Gregory Crawford, Barrett Hazeltine*