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Our thirtieth season of prominent speaker programs

March 2015

In This Issue

[2014-2015 Speakers](#)

[Morrison Biography](#)

[Morrison Guest Ticket Requests](#)

[Aleman Biography](#)

[Aleman Guest Ticket Request](#)

[2014-2015 Student Sponsors](#)

Charles S. Morrison

President Asset Management

Fidelity Investments

Naples Beach Hotel Convention Center, River of Grass Ballroom

Friday, March 6, 2015



Charlie Morrison is president of Asset Management for Fidelity Investments, a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. Mr. Morrison is also a member of Fidelity's Executive Committee.

In his current role, Mr. Morrison oversees Fidelity's investment divisions that collectively manage \$1.9 trillion in retail and institutional assets on behalf of individual investors, intermediaries, and institutions worldwide. In addition to overseeing Fidelity Management & Research Company (FMRCo), Pyramis Global Advisors, and the Asset Allocation teams, Mr. Morrison is also responsible for Asset Management's functional support areas, including operations, product, compliance, technology, investment business development, human resources, marketing, and finance.

Prior to this appointment, Mr. Morrison served as president of Asset Management's Fixed- Income division, a role he held since 2011. Prior to that, Mr. Morrison was in a senior role at Fidelity overseeing several strategic projects for the company. From 2004 to 2009, he served as president of Fidelity's Money Market division and, from 2002 to 2004, he served as head of Fidelity's Bond division.

Mr. Morrison joined Fidelity as a corporate bond analyst in 1987. He began managing Trust accounts in 1990 and was promoted to a vice president of Fidelity Management Trust Company in 1992. During this time, he was responsible for managing a variety of short-term, as well as broad-market, bond portfolios. From 1995 to 1997, he managed Fidelity Short-Term Bond Fund, Spartan Short-Term Bond Fund, and Fidelity Advisor Short Fixed Income Fund. Mr. Morrison managed the fixed-income investments for Fidelity Asset Manager, Fidelity Asset Manager: Income, Fidelity Asset Manager: Aggressive, Fidelity Asset Manager:

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Growth, Fidelity Advisor Asset Allocation, and Fidelity Global Asset Allocation portfolios from 1990 until 2002.

Before joining Fidelity Investments, Mr. Morrison was a bond analyst with Dean Witter Reynolds in New York from 1983 to 1985.

Mr. Morrison earned his Bachelor of Arts degree in economics from Dartmouth College in 1983 and an MBA from Harvard Business School in 1987.

Guest Ticket Requests for March 6, 2015

Charles S. Morrison

To place a request for one guest ticket please submit to

forumclub@theforumclub.org

If guests tickets are available requests are processed in order of receipt and must be received by

February 27th.

They will be mailed by that date and you will be billed \$40, or notified if there is no space.

Tickets are non-exchangeable and non-refundable

Alberto Aleman Zubieta

Former CEO/Administrator

Panama Canal

Naples Beach Hotel, Everglades Dining Room

Friday, March 20, 2015



Alberto Alemán Zubieta is the former CEO of the Panama Canal Authority, the autonomous agency that manages the Panama Canal, the leading interoceanic waterway that serves world maritime commerce.

Alberto Alemán Zubieta began his professional career in the construction field. For many years, he served as CEO of one of the largest construction companies in the Republic of Panama. From 1996 to 1999, he served as Administrator of the former Panama Canal Commission, the United States Government federal agency which was responsible, until December 31, 1999, for the administration and operation of the Panama Canal.

In 1998, two years into his appointment as head of the Panama Canal Commission, he was appointed Administrator of the Panama Canal Authority, the Panamanian entity tasked with the administration of the waterway upon its transfer to the Republic of Panama, on December 31, 1999. During the following two years, he served simultaneously as Administrator for both the Panama Canal Commission and the Panama Canal Authority, ensuring that the decisions taken under the Panama Canal Commission would have continuity under the Panama

1993

Joe B. Cox

1992

John T. Duffner*

1991

Alan R. Korest

1990

Tom Shea

1989

Corbin A. Wyant

1988

Robert D. Stakich*

1987

Brenda C. Wilson

1986

Leonard F. Llewellyn*

1985

William S. Gentry*

Founder

*deceased

2014-2015 SPEAKER PROGRAM

MICHAEL J. MORELL**November 14, 2014**Former Deputy Director
Central Intelligence Agency**J. LARRY NICHOLS****December 6, 2014**Chairman
Devon Energy Corporation**ARTHUR C. BROOKS****January 9, 2015**President
American Enterprise Institute**JEFFREY WADSWORTH,
Ph.D.****January 23, 2015**President & CEO
Battelle Memorial Institute, Inc.**MARY SUE COLEMAN****February 6, 2015**President Emerita
University of Michigan**CHARLES S. MORRISON****March 6, 2015**President Asset Management
Fidelity Investments**ALBERTO ALEMAN****ZUBIETA****March 20, 2015**Former CEO & Administrator
Panama Canal**JERRAL W. JONES SR.**

Canal Authority. In 2005, the Board of Directors re-elected him to lead the Panama Canal Authority for another seven years.

Under his leadership, the Panama Canal Authority's vision has been to transform the Canal into a world leader in services to the maritime industry, to be the cornerstone of the global transportation system, and a model of excellence, integrity, and transparency.

Alberto Alemán Zubieta has been instrumental in promoting a sense of pride among Panamanians for the Panama Canal. The maritime industry has acknowledged his leadership in transforming the Canal into a successful model of operation. For these reasons, his participation is frequently requested in different forums, in order to share his thoughts and best practices.

Alberto Alemán Zubieta is the recipient of numerous national and international awards for his achievements and contributions to the world maritime industry including the National Order of The Legion of Honor, the highest award bestowed by the French Government, awarded in December 2006.

He is member of various international and local organizations, such as: the International Advisory Board of Texas A&M University, the World Economic Forum, the Chief Executives Organization, the Panamanian Chamber of Construction, and the Panamanian Association of Architects and Engineers, among others.

A native of Panama City, Republic of Panama, Alberto Alemán Zubieta is a graduate of the civil and industrial engineering schools of Texas A&M University. He lives in Panama with his wife, Ana Matilde, and their three children.

Guest Ticket Requests for March 20, 2015

Alberto Aleman Zubieta

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forumclub@theforumclub.org

If guests tickets are available requests are processed in order of receipt and must be received by

March 13th.

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Tickets are non-exchangeable and non-refundable

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- *Provide a congenial meeting atmosphere for members to enjoy prominent speakers in fields such as academia, business, economics, finance, government, health, international relations, media and the arts, science and technology*
- *Promote the highest civic, moral and ethical standards*
- *Share the "Forum Club Experience" with outstanding high school students in Collier County*
- *Provide scholarships to Collier County high school students*

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