Consuelo Mack WealthTrack #1001 “Women, Investing & Retirement Part 1”

Guests:
Jewelle Bickford, Senior Strategist, GenSpring
Ami Forte, Managing Director, The Forte Group at Morgan Stanley

In part one of Consuelo Mack WealthTrack’s two-part series on women, investing and retirement, Morgan Stanley’s award-winning financial advisor Ami Forte and GenSpring’s Senior Strategist Jewelle Bickford discuss why the traditional financial planning approach doesn’t work for women.

Consuelo Mack WealthTrack #1002 “Women, Investing & Retirement Part 2”

Guests:
Erin Botsford, CEO, The Botsford Group
Mary Beth Franklin, Contributing Editor, InvestmentNews

In part two of Consuelo Mack WealthTrack’s women, investing and retirement series, award-winning financial advisor Erin Botsford and retirement and social security expert Mary Beth Franklin discuss the kinds of financial products women need to have a secure retirement.

Consuelo Mack WealthTrack #1003 “New Investment Era”

Guests:
Richard Bernstein, CEO, CIO, Richard Bernstein Advisors LLC
Dan Fuss, Vice Chairman, Portfolio Manager, Loomis Sayles & Company

This week’s Consuelo Mack WealthTrack explores a new investment era. If 30-plus years of falling interest rates are coming to an end, what are the new rules of investing? Loomis Sayles’ legendary bond manager Dan Fuss and top-ranked strategist turned portfolio manager Richard Bernstein provide their contrarian answers.

Consuelo Mack WealthTrack #1004 “First Class Bargains”

Guest: David Winters, Portfolio Manager, Wintergreen Fund

This week’s Consuelo Mack WealthTrack explores first class merchandise at bargain prices. That’s what “Great Investor” David Winters says he is finding in top companies across the globe. He explains why the opportunities for building wealth in global stock markets have never been better.

Consuelo Mack WealthTrack #1005 “The New Retirement Conversation”

Guests:
Mary Beth Franklin, Contributing Editor, InvestmentNews
Kimberly Lankford, Contributing Editor, Kiplinger’s Personal Finance

This week’s Consuelo Mack WealthTrack guides you through the new retirement conversation. With traditional pension funds rapidly disappearing, what are the new building blocks for a secure retirement? Personal finance experts Mary Beth Franklin and Kim Lankford discuss the essentials and explain why insurance could become the next big retirement tool.
Consuelo Mack WealthTrack #1006 “Affording Your Retirement”

Guest: Harold Evensky, President, Evensky & Katz Wealth Management

This week’s Consuelo Mack WealthTrack explores ways to afford your retirement. Award-winning financial planner Harold Evensky explains his strategies to protect your lifestyle, nest egg, and portfolio through your golden years.

Consuelo Mack WealthTrack #1007 “What It Takes”

Guest: Charles Ellis, Founder, Greenwich Associates; Author, “What It Takes”

This week’s Consuelo Mack WealthTrack features an exclusive interview with “Financial Thought Leader” Charles Ellis about “what it takes” to be the best in the business. Ellis shares 50 years of wisdom learned from advising firms and governments on where to invest.

Consuelo Mack WealthTrack #1008 “Finding Global Value”

Guests:
David Darst, Chief Investment Strategist, Morgan Stanley Wealth Management
Peter Langerman, Chairman, CEO, Franklin Mutual Advisers, LLC; Co-Portfolio Manager, Mutual Global Discovery Fund

This week’s Consuelo Mack WealthTrack explores where in the world you can find the highest quality businesses at bargain basement prices. Morgan Stanley’s asset allocation star David Darst and Mutual Global Discovery Fund’s Peter Langerman pick their favorite investment spots.

Consuelo Mack WealthTrack #1009 “Global Real Estate”

Guests:
Gregg Fisher, Founder, Chief Investment Officer, Gerstein Fisher
Jason Wolf, Lead Portfolio Manager, Third Avenue Real Estate Value Fund

This week’s Consuelo Mack WealthTrack explores investment opportunities in global real estate. Jason Wolf of top-performing Third Avenue Real Estate Value Fund and award-winning wealth manager Gregg Fisher explain why they are buying properties overseas.

Consuelo Mack WealthTrack #1010 “Great Investors: John Bogle”

Guest: John Bogle, Founder, Vanguard; President, Bogle Financial Markets Research Center

This week’s Consuelo Mack WealthTrack features an interview with one of the investment greats! John C. Bogle, Vanguard founder, index fund creator and tireless advocate for the little guy, discusses how investors can succeed despite Wall Street’s problems.

Consuelo Mack WealthTrack #1011 “Great Investors: Robert Kessler”

Guest: Robert Kessler, Founder, CEO, The Kessler Companies

This week’s Consuelo Mack WealthTrack explores the case for bonds. “Great Investor” Robert Kessler explains why moving out of bonds could be a big investment mistake.
Consuelo Mack WealthTrack #1012 “Macro Matters”

Guests:
Nancy Lazar, Co-Founder and Economist, Cornerstone Macro
François Trahan, Co-Founder and Head of Portfolio Strategy, Cornerstone Macro

This week’s Consuelo Mack WealthTrack features a TV first with a new macro research team. Cornerstone Macro’s top-ranked economist Nancy Lazar and investment strategist François Trahan on the big trends they see that will move markets.

Consuelo Mack WealthTrack #1013 “Bond Bets”

Guest: Kathleen Gaffney, Portfolio Manager, Eaton Vance Bond Fund

With interest rates rising and bond prices falling, is this any time to launch a bond fund? Consuelo Mack WealthTrack “Great Investor” Kathleen Gaffney says “yes” and explains what she is doing with the new Eaton Vance Bond Fund.

Consuelo Mack WealthTrack #1014 “Financial Crisis?”

Guest: Matthew McLennan, Portfolio Manager, First Eagle Global Fund

This week’s Consuelo Mack WealthTrack questions whether the global financial crisis is really over. First Eagle Fund’s Matthew McLennan believes the return to normalcy is a mirage and explains the steps he is taking to protect his investors.

Consuelo Mack WealthTrack #1015 “Great Investors Exclusive: Richard Freeman”

Guest: Richard Freeman, Co-Portfolio Manager, ClearBridge Aggressive Growth Fund

This week’s Consuelo Mack WealthTrack features an exclusive interview with “Great Investor” Richard Freeman who is celebrating his 30th anniversary at the helm of the ClearBridge Aggressive Growth Fund, which has beaten the market and competition for decades.

Consuelo Mack WealthTrack #1016 “Seismic Investment Shift!”

Guest: David Rosenberg, Chief Economist and Strategist, Gluskin Sheff

This week’s Consuelo Mack WealthTrack reveals a seismic shift for investors. Influential economist and strategist David Rosenberg explains why he now believes the era of low inflation is over and the changes it will bring to the economy and markets.

Consuelo Mack WealthTrack #1017 “Dirty Words of Finance”

Guest: Cliff Asness, Managing and Founding Principal, AQR Capital Management

This week’s Consuelo Mack WealthTrack, features a rare interview with “Financial Thought Leader” Cliff Asness of AQR Capital Management, a global investment management firm which runs hedge funds, mutual funds and a diversified collection of investment strategies. Asness discusses the three “dirty words” of finance and how investors can get back to “clean” investing principles.
Consuelo Mack WealthTrack #1018 “Martin Whitman Exclusive”

Guest: Martin Whitman, Founder and Chairman, Third Avenue Management

This week’s Consuelo Mack WealthTrack features an exclusive TV interview with legendary deep value investor Martin Whitman, Founder and Chairman of Third Avenue Management. In Anchor Consuelo Mack’s interview, Whitman takes on Congressional and Wall Street ignorance about debt and credit worthiness. His view: They just don’t get it!

Consuelo Mack WealthTrack #1019 “Great Investor Turns Cautious”

Guest: Donald Yacktman, Founder, Portfolio Manager, Yacktman Fund

This week’s Consuelo Mack WealthTrack features an interview with “Great Investor” Donald Yacktman of The Yacktman Funds, who is becoming more cautious. Yacktman has delivered top performance for more than two decades by staying true to his investment process, but adapting to market conditions. He explains what he is changing now.

Consuelo Mack WealthTrack #1020 “Socially Responsible Investing”

Guest: Barbara Krumsiek, CEO, Calvert Investments, Inc.

More money is flowing into Socially Responsible Investment funds than ever before. This week’s Consuelo Mack WealthTrack features Calvert Investment’s CEO and industry thought leader Barbara Krumsiek, who explains why.

Consuelo Mack WealthTrack #1021 “Mutual Fund Shakeups”

Guests: Christine Benz, Director of Personal Finance, Senior Columnist, Morningstar, Inc.
Russel Kinnel, Director of Mutual Fund Research, Editor of “Morningstar FundInvestor,” Morningstar, Inc.

This week’s Consuelo Mack WealthTrack looks at major changes in the mutual fund industry. Investors are deserting actively managed funds for passive ones and fleeing bond funds for other sources of income. In their first joint television appearance, two Morningstar veterans -- Christine Benz, Director of Personal Finance and Russel Kinnel, Director of Mutual Fund Research -- tell us what it all means for investors and their funds.

Consuelo Mack WealthTrack #1022 “Income Shift”

Guest: Mark Freeman, Portfolio Manager, Westwood Income Opportunity Fund

This week’s Consuelo Mack WealthTrack explores ways to find income in a low yield world without taking on too much risk. One of Morningstar’s favorite fund managers, Westwood Income Opportunity Fund’s Mark Freeman, explains why he is moving out of bonds and into stocks.

Consuelo Mack WealthTrack #1023 “Active vs. Passive”

Guests: Gregg Fisher, Chief Investment Officer, Gerstein Fisher
Daniel Wallick, Principal, Investment Strategy Group, Vanguard

This week’s Consuelo Mack WealthTrack tackles the active versus passive investing debate. Which strategy is best for you? Vanguard’s Daniel Wallick and award-winning financial planner Gregg Fisher argue the pros and cons.
Consuelo Mack WealthTrack #1024 “Women, Investing & Retirement Part 2”

Guests:
Erin Botsford, CEO, The Botsford Group
Mary Beth Franklin, Contributing Editor, InvestmentNews

In part two of Consuelo Mack WealthTrack’s women, investing and retirement series, award-winning financial advisor Erin Botsford and retirement and social security expert Mary Beth Franklin discuss the kinds of financial products women need to have a secure retirement.

Consuelo Mack WealthTrack #1025 “Minimizing Tax Pain”

Guests:
Mark Cortazzo, Senior Partner, MACRO Consulting
Alexandra Lebenthal, President & CEO, Lebenthal Holdings

A combination of new federal laws and stock market gains mean many Americans are facing much higher tax bills. Financial advisors Alexandra Lebenthal and Mark Cortazzo help minimize the pain this week on Consuelo Mack WealthTrack.

Consuelo Mack WealthTrack #1026 “Fed Centennial Special”

Guests:
James Grant, Founder & Editor, “Grant’s Interest Rate Observer”
Richard Sylla, Henry Kaufman Professor of the History of Financial Institutions and Markets, Stern School of Business, New York University

Is the 100th anniversary of the creation of the Federal Reserve (December 23, 1913) a cause for celebration or condemnation? Two financial historians James Grant and Richard Sylla debate the benefits and dangers of the Fed on this week’s Consuelo Mack WealthTrack.

Consuelo Mack WealthTrack #1027 “Consistent Great Investor”

Guest: Brian Rogers, Portfolio Manager, T. Rowe Price Equity Income Fund

This week’s Consuelo Mack WealthTrack features a rare interview with T. Rowe Price Equity Income fund’s long-time Portfolio Manager Brian Rogers on why caution is his guiding principal in today’s market.

Consuelo Mack WealthTrack #1028 “Great Value Investors”

Guests:
Tom Russo, Partner, Gardner Russo & Gardner
Wallace Weitz, President, Portfolio Manager, Weitz Funds

This week’s Consuelo Mack WealthTrack features a rare get-together with two value investors who have outstanding track records: Weitz Funds’ Wally Weitz and investment advisor Tom Russo discuss the different places each is finding value, and why Warren Buffet is their investment hero.
Consuelo Mack WealthTrack #1029 “Legendary Investors’ Predictions”

Guests:
Ed Hyman, Chairman, ISI Group
Bill Miller, Portfolio Manager, Legg Mason Opportunity Trust

This week Consuelo Mack WealthTrack features two investment legends in an exclusive television interview: ISI Group’s Ed Hyman, Wall Street’s number one-ranked economist for 34 years running is joined by Legg Mason’s history-making portfolio manager Bill Miller to discuss their top investment forecasts and strategies for 2014.

Consuelo Mack WealthTrack #1030 “Legendary Investors’ Predictions Part 2”

Guests:
Ed Hyman, Chairman, ISI Group
Bill Miller, Portfolio Manager, Legg Mason Opportunity Trust

This week Consuelo Mack WealthTrack features part two of its exclusive television interview with Wall Street legends Ed Hyman and Bill Miller. Where do both pros think there is the most money to be made this year? Hyman gives his “one free pass” for investors and Miller shares his two “no brainers.”

Consuelo Mack WealthTrack #1031 “Great Investor Thinking Big”

Guest: Charlie Dreifus, Portfolio Manager Royce Special Equity Multi-Cap Fund

This week’s Consuelo Mack WealthTrack features a “Great Investor” who has made his name investing in small company stocks. Charlie Dreifus, the portfolio manager of the Royce Special Equity funds, explains why he now favors large companies and discusses why big is better in today’s markets.

Consuelo Mack WealthTrack #1032 “Fund Manager of the Year Daniel O’Keefe”

Guest: Daniel O’Keefe, Portfolio Manager, Artisan International Value, Artisan Global Value funds

This week’s Consuelo Mack WealthTrack features a rare interview with the 2013 and 2008 Morningstar International Stock Fund Manager of the Year. Portfolio Manager Daniel O’Keefe explains how his Artisan International Value and Artisan Global Value funds trounce the competition and the market in both bull and bear markets.

Consuelo Mack WealthTrack #1033 “Emerging Market Opportunities”

Guests:
Teresa Kong, Lead Portfolio Manager, Matthews Asia Strategic Income Fund
Peter Marber, Head of Emerging Markets Investments, Loomis Sayles & Company

This week’s Consuelo Mack WealthTrack explores opportunities in emerging markets. Investors are fleeing them, but this week’s guests, Teresa Kong of Matthews Asia and Peter Marber of Loomis Sayles, say not all emerging markets are the same.
Consuelo Mack WealthTrack #1034 “Investing in Muni Bonds”

Guests:
Robert Amodeo, Head of Municipals, Western Asset Management
Robert DiMella, Co-Head, MacKay Municipal Managers

This week’s Consuelo Mack WealthTrack focuses on the rising appeal of municipal bonds. Despite some negative headlines, top fund managers Robert Amodeo of Western Asset Management and Robert DiMella of MacKay Municipal Managers say there are opportunities to be had in munis.

Consuelo Mack WealthTrack #1035 “Financial Thought Leaders: Robert Shiller”

Guest: Robert Shiller, Sterling Professor of Economics, Yale University; Professor of Finance, Yale School of Management; Author, Finance and the Good Society

On this week’s Consuelo Mack WealthTrack: Nobel Prize-winning Yale economist, Robert Shiller discusses the importance of psychology in the markets and what it’s telling him now.

Consuelo Mack WealthTrack #1036 “The New Retirement Conversation”

Guests:
Mary Beth Franklin, Contributing Editor, InvestmentNews
Kimberly Lankford, Contributing Editor, Kiplinger’s Personal Finance

This week’s Consuelo Mack WealthTrack guides you through the new retirement conversation. With traditional pension funds rapidly disappearing, what are the new building blocks for a secure retirement? Personal finance experts Mary Beth Franklin and Kim Lankford discuss the essentials and explain why insurance could become the next big retirement tool.

Consuelo Mack WealthTrack #1037 “Global Real Estate”

Guests:
Gregg Fisher, Founder, Chief Investment Officer, Gerstein Fisher
Jason Wolf, Co-Lead Portfolio Manager, Third Avenue Real Estate Value Fund

This week’s Consuelo Mack WealthTrack explores investment opportunities in global real estate. Jason Wolf of top-performing Third Avenue Real Estate Value Fund and award-winning wealth manager Gregg Fisher explain why they are buying properties overseas.

Consuelo Mack WealthTrack #1038 “Fed Centennial Special”

Guests:
James Grant, Founder & Editor, “Grant’s Interest Rate Observer”
Richard Sylla, Henry Kaufman Professor of the History of Financial Institutions and Markets, Stern School of Business, New York University

Is the 100th anniversary of the creation of the Federal Reserve (December 23, 1913) a cause for celebration or condemnation? Two financial historians James Grant and Richard Sylla debate the benefits and dangers of the Fed this week’s Consuelo Mack WealthTrack.
Consuelo Mack WealthTrack #1039 “Great Income Investor: Edward Perks”

Guest: Edward Perks, Director of Portfolio Management, Franklin Equity Group; Portfolio Manager, Franklin Income Fund;

A reliable and decent source of income is hard to find, but this week’s Consuelo Mack WealthTrack guest runs the Franklin Income Fund, which has been paying a monthly dividend since 1948. “Great Investor” Edward Perks reveals where he is finding the best income now.

Consuelo Mack WealthTrack #1040 “Great Value Investor: David Winters”

Guest: David Winters, Founder, Portfolio Manager, The Wintergreen Fund

This week’s Consuelo Mack WealthTrack features “Great Investor” David Winters of the Wintergreen Fund, who says there are excellent values to be found in global blue chips.

Consuelo Mack WealthTrack #1041 “Greatest Financial Challenges”

Guests:

This week’s Consuelo Mack WealthTrack features Jonathan Clements and Jason Zweig, two top personal finance journalists both now at The Wall Street Journal, who tackle the three greatest financial challenges facing Americans.

Consuelo Mack WealthTrack #1042 “Fundamental Differences”

Guest: Robert Arnott, Chairman, Research Affiliates

This week’s Consuelo Mack WealthTrack asks: is there such thing as a better mouse trap? “Financial Thought Leader” Robert Arnott, chairman of Research Affiliates, says he has created a better alternative to traditional index funds with his fundamental index approach.

Consuelo Mack WealthTrack #1043 “Financial Legend Ken Heebner”

Guest: Ken Heebner, Portfolio Manager, CGM Focus Fund

This week’s Consuelo Mack WealthTrack explains why Ukraine developments matter to investors and the contrarian opportunities in the market with CGM Focus Fund’s “Great Investor” and legendary stock picker Ken Heebner.

Consuelo Mack WealthTrack #1044 “Small Company Stock Pioneer Chuck Royce”

Guest: Chuck Royce, Director of Investments, Portfolio Manager, The Royce Funds

This week’s Consuelo Mack WealthTrack features an exclusive TV interview with “Great Investor” and small cap pioneer Chuck Royce, who explains why a market correction is in our future and why quality companies will lead coming out of it.
Consuelo Mack WealthTrack #1045 “Financial Thought Leader Andrew Lo”

Guest: Andrew Lo, Professor of Finance, MIT Sloan School of Management; Head of MIT’s Laboratory for Financial Engineering; Chairman and Chief Investment Strategist, Alpha Simplex

This week’s Consuelo Mack WealthTrack answers: what can investors do to avoid making bad decisions? “Financial Thought Leader” and MIT Professor Andrew Lo explains his latest research on “artificial stupidity!”

Consuelo Mack WealthTrack #1046 “Christopher Davis: Third Generation Investor”

Guest: Christopher Davis, Portfolio Manager, The Davis Funds

This week’s Consuelo Mack WealthTrack features a rare interview with third-generation “Great Investor” Christopher Davis on the family’s winning strategy of owning businesses not stocks.

Consuelo Mack WealthTrack #1047 “Great Investor Chuck Akre”

Guest: Chuck Akre, Portfolio Manager, Akre Focus Fund

This week’s Consuelo Mack WealthTrack features a rare interview with “Great Investor” Chuck Akre who specializes in finding “compounding machines,” the rare breed of companies delivering above-average returns year after year.

Consuelo Mack WealthTrack #1048 “Great Investor Steven Romick”

Guest: Steven Romick, Portfolio Manager, FPA Crescent Fund

This week’s Consuelo Mack WealthTrack features a rare interview “Great Investor” Steven Romick, Morningstar’s 2013 Allocation Fund Manager of the Year, on why he is holding large sums of cash in his FPA Crescent Fund.

Consuelo Mack WealthTrack #1049 “A Small Cap Investor Thinks Big”

Guest: Charles Dreifus, Portfolio Manager, Royce Special Equity Multi-Cap Fund

This week’s Consuelo Mack WealthTrack features a “Great Investor” who has made his name investing in small company stocks. Charlie Dreifus, the portfolio manager of the Royce Special Equity funds, explains why he now favors large companies and discusses where he is finding the greatest values in the market now.

Consuelo Mack WealthTrack #1050 “Mutual Fund Shakeups”

Guests:
Christine Benz, Director of Personal Finance, Senior Columnist, Morningstar, Inc.
Russel Kinnel, Director of Mutual Fund Research, Editor of “Morningstar FundInvestor,” Morningstar, Inc.

This week’s Consuelo Mack WealthTrack looks at major changes in the mutual fund industry. Investors are deserting actively managed funds for passive ones and fleeing bond funds for other sources of income. In their first joint television appearance, two Morningstar veterans -- Christine Benz, Director of Personal Finance, and Russel Kinnel, Director of Mutual Fund Research -- tell us what it all means for investors and their funds.
Consuelo Mack WealthTrack #1051 “Global Bond Investor”

Guest: Michael Hasenstab, Portfolio Manager, Templeton Global Bond Fund

This week’s Consuelo Mack WealthTrack features a next generation “Great Investor.” Templeton Global Bond Fund’s Michael Hasenstab explains his contrarian views of the world, including his shunning of U.S. Treasury securities and embrace of emerging market debt.

Consuelo Mack WealthTrack #1052 “Energy Financial Thought Leader”

Guest: Thomas Petrie, Chairman, Petrie Partners

Are we having an energy revolution? Will the U.S. soon be energy independent? Energy guru, Petrie Partners’ Tom Petrie answers those questions and more from his 40 years of energy industry experience in a Consuelo Mack WealthTrack TV exclusive interview.