Consuelo Mack WealthTrack #901 “Impact Investing Opportunities, Part 1”

Guests:
Mary Jane McQuillen, Portfolio Manager, Head of ESG Investment Program, ClearBridge Advisors
Bill Paul, Founder & Editor, Earthpreservers.com; Energy & Environmental Journalist

This week’s Consuelo Mack WealthTrack reveals how to make a difference with your investments. Part one of WealthTrack’s impact investing series explores what it is and why it has gone global with Portfolio Manager Mary Jane McQuillen from ClearBridge Advisors and environmental and energy analyst Bill Paul.

Consuelo Mack WealthTrack #902 “Impact Investing Opportunities, Part 2”

Guests:
Ingrid Dyott, Portfolio Manager, Neuberger Berman Socially Responsive Fund
Amy O’Brien, Head of Global Social & Community Investing, TIAA-CREF

Part two of Consuelo Mack WealthTrack’s impact investing series reveals more ways to make money while doing good. Two investment pros, Neuberger Berman Portfolio Manager Ingrid Dyott and TIAA-CREF’s Amy O’Brien, share their strategies to match financial goals with values.

Consuelo Mack WealthTrack #903 “Financial Thought Leaders: David Rosenberg”

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

This week Consuelo Mack WealthTrack features an interview with the “Financial Thought Leader” who has gotten it right throughout the financial crisis and beyond. Anchor and Managing Editor Consuelo Mack asks David Rosenberg, Gluskin Sheff’s Chief Economist and Strategist, what he sees in the future now and why, after years of pessimism, he believes “the future is brighter than you think.”

Consuelo Mack WealthTrack #904 “Financial Thought Leaders: Bob Doll”

Guest: Bob Doll, Consultant, BlackRock

This week Consuelo Mack WealthTrack features an influential strategist and money manager who believes investor pessimism towards stocks is way overdone. BlackRock consultant Bob Doll explains why, after the worst decade since the 1930s, stocks will be the best investment of the next decade.

Consuelo Mack WealthTrack #905 “Financial Thought Leaders: Francois Trahan”

Guest: Francois Trahan, Head of Portfolio Strategy & Quantitative Research, Wolfe Trahan

On this week’s Consuelo Mack WealthTrack, leading investment strategist Francois Trahan takes on the naysayers and explains why he expects stocks to reach new highs in the coming months.

Consuelo Mack WealthTrack #906 “Great Investors: Robert Kessler”

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

This week’s Consuelo Mack WealthTrack features a “Great Investor” who has gotten it right before, during and after the financial crisis. Bond manager Robert Kessler explains why he still believes the world is a dangerous place and U.S. Treasury bonds are the right choice for investors.
Consuelo Mack WealthTrack #907 “Harmful Investment Fees: Charles Ellis & Mark Cortazzo”

Guests
Mark Cortazzo, Senior Partner, MACRO Consulting; Founder, Flat Fee Portfolios
Charles Ellis, Founder, Greenwich Associates; Author, The Elements of Investing

This week’s Consuelo Mack WealthTrack features a television exclusive with financial legend Charles Ellis, who joins innovative financial planner Mark Cortazzo to explain why investment fees are much higher and more harmful than you think, and how you can fight back.

Consuelo Mack WealthTrack #908 “Maximizing Social Security Benefits”

Guest: Mary Beth Franklin, Contributing Editor, InvestmentNews

Consuelo Mack WealthTrack reveals how to maximize your Social Security benefits, the only pension plan most Americans can count on. Award-winning financial planner and retirement expert Mary Beth Franklin shares little-known tips on how to get the most out of Social Security for you and your loved ones.

Consuelo Mack WealthTrack #909 “The Big Retirement Risk”

Guest: Erin Botsford, CEO, The Botsford Group; Author, The Big Retirement Risk: Running Out of Money Before You Run Out of Time

This week’s Consuelo Mack WealthTrack focuses on avoiding the biggest retiree fear: running out of money. Erin Botsford, financial planner and author of The Big Retirement Risk, discusses her “lifestyle-driven” approach to investing.

Consuelo Mack WealthTrack #910 “Financial Thought Leaders: Niall Ferguson”

Guest: Niall Ferguson, Financial Historian; Author, Civilization: The West and the Rest

This week on Consuelo Mack WealthTrack, “Financial Thought Leader” Niall Ferguson discusses why the centuries long dominance of Western economic and political power is waning and what the United States needs to do prevent it from slipping even more.

Consuelo Mack WealthTrack #911 “Global Financial Crisis”

Guests:
John Lipsky, Distinguished Scholar, SAIS; Former First Deputy Managing Director, IMF
Nick Sargen, Chief Investment Officer, Fort Washington Investment Advisors

This week’s Consuelo Mack WealthTrack features a rare interview with a man central to solving the global financial crisis: “Financial Thought Leader” John Lipsky, the recently retired First Deputy Managing Director of the International Monetary Fund. Lipsky joins Anchor and Managing Editor Consuelo Mack and seasoned investment strategist Nick Sargen, Chief Investment Officer at Fort Washington Investment Advisors, to discuss the turmoil in Europe, slowdown in China, and what it means for investors.
Consuelo Mack WealthTrack #912 “Financial Thought Leaders: David Darst”

Guest: David Darst, Chief Investment Strategist, Morgan Stanley Smith Barney

This week’s Consuelo Mack WealthTrack explores what it will take to rebuild investor confidence. “Financial Thought Leader” David Darst, Chief Investment Strategist at Morgan Stanley Smith Barney, discusses the positive signs he’s seeing in the U.S. and global markets and why investors should start to trust the markets.

Consuelo Mack WealthTrack #913 “Great Investors: Matthew McLennan”

Guest: Matthew McLennan, Portfolio Manager, First Eagle Funds

This week’s Consuelo Mack WealthTrack features a next generation “Great Investor” who is successfully filling the shoes of the legendary Jean Marie Eveillard at First Eagle Funds. Matthew McLennan, portfolio manager of First Eagle Global, tells Anchor and Managing Editor Consuelo Mack where in the world he’s finding value now.

Consuelo Mack WealthTrack #914 “Financial Thought Leaders: James Grant”

Guest: James Grant, Founder, Editor, Grant’s Interest Rate Observer

This week’s Consuelo Mack WealthTrack features a rare interview with influential “Financial Thought Leader” and financial historian James Grant, founder and editor of Grant’s Interest Rate Observer. Anchor and Managing Editor Consuelo Mack and Grant discuss why the Federal Reserve’s policies of zero interest rates and massive purchases of U.S. Treasury and mortgage-backed bonds are dangerous to the economy and damaging to savers.

Consuelo Mack WealthTrack #915 “Great Investors: David Winters”

Guest: David Winters, Portfolio Manager, Wintergreen Fund

This week’s Consuelo Mack WealthTrack features “Great Investor” David Winters, portfolio manager of the top-rated Wintergreen Fund, who explains why he is finding numerous investment opportunities around the globe and why investors shouldn’t believe the bearish view that the “cult of equity is dead.”

Consuelo Mack WealthTrack #916 “Great Investors: Bruce Berkowitz”

Guest: Bruce Berkowitz, Portfolio Manager, Fairholme Fund

This week’s Consuelo Mack WealthTrack features a rare interview with Morningstar’s Fund Manager of the Decade, “Great Investor” Bruce Berkowitz, who discusses Fairholme Fund’s controversial concentration in financial stocks and other unloved securities.

Consuelo Mack WealthTrack #917 “Great Investors: Steven Romick”

Guest: Steven Romick, Portfolio Manager, FPA Crescent Fund

This week’s Consuelo Mack WealthTrack features a rare interview with “Great Investor” Steven Romick of FPA Crescent Fund. Romick describes how he is keeping his five-star-rated fund on top by balancing the forces of inflation and deflation, and continuing his contrarian, value-oriented strategies.
Consuelo Mack WealthTrack #918 “International Investing Opportunities”

Guests:
Andrew Foster, Founder, Seafarer Capital Partners
David Nadel, Portfolio Manager, The Royce Funds

This week’s Consuelo Mack WealthTrack focuses on international investing with David Nadel, portfolio manager and director of international research at the Royce Funds, and Andrew Foster, founder of Seafarer Capital Partners. Discover how these global investors are finding the best value, growth and income overseas by investing in emerging markets and smaller company stocks.

Consuelo Mack WealthTrack #919 “Election 2012 Outlook”

Guests:
Jeff Applegate, Chief Investment Officer, Morgan Stanley Wealth Management
Andy Laperriere, Senior Managing Director, ISI Group

This week’s Consuelo Mack WealthTrack explores what's at stake in next week's Presidential election. Top-ranked Washington analyst Andy Laperriere of ISI Group, and Chief Investment Officer Jeff Applegate of Morgan Stanley explain why the race is so close and how the results could impact the markets and economy.

Consuelo Mack WealthTrack #920 “Financial Thought Leaders: Tom Gallagher”

Guest: Tom Gallagher, Principal, The Scowcroft Group

This week’s Consuelo Mack WealthTrack features a post-election, television exclusive interview with Wall Street’s long-time, number one-ranked Washington analyst Tom Gallagher of The Scowcroft Group. Gallagher and Anchor and Managing Editor Consuelo Mack discuss what the U.S. Presidential election outcome means for the economy and markets, as well as how it affects your job, taxes and portfolio.

Consuelo Mack WealthTrack #921 “Financial Thought Leaders: John C. Bogle”

Guest: John C. Bogle, Founder, Vanguard; President, Bogle Financial Markets Research Center; Author, The Clash of the Cultures

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 #922 “Impact Investing Opportunities, Part 1”

Guests:
Mary Jane McQuillen, Portfolio Manager, Head of ESG Investment Program, ClearBridge Advisors
Bill Paul, Founder & Editor, Earthpreservers.com; Energy & Environmental Journalist

This week’s Consuelo Mack WealthTrack reveals how to make a difference with your investments. Part one of WealthTrack’s impact investing series explores what it is and why it has gone global with Portfolio Manager Mary Jane McQuillen from ClearBridge Advisors and environmental and energy analyst Bill Paul.
Consuelo Mack WealthTrack #923 “Impact Investing Opportunities, Part 2”

Guests:
Ingrid Dyott, Portfolio Manager, Neuberger Berman Socially Responsive Fund
Amy O’Brien, Head of Global Social & Community Investing, TIAA-CREF

Part two of Consuelo Mack WealthTrack’s impact investing series reveals more ways to make money while doing good. Two investment pros, Neuberger Berman Portfolio Manager Ingrid Dyott and TIAA-CREF’s Amy O’Brien, share their strategies to match financial goals with values.

Consuelo Mack WealthTrack #924 “Financial Thought Leaders: Michael Mauboussin”

Guest: Michael Mauboussin, Chief Investment Strategist, Legg Mason Capital Management; Author, The Success Equation

This week’s Consuelo Mack WealthTrack features “Financial Thought Leader” Michael Mauboussin, who explains the important roles luck and skill play in investment success and how to harness both to your advantage.

Consuelo Mack WealthTrack #925 “Reducing Taxes”

Guests:
Robert Amodeo, Head of Municipal Investments, Portfolio Manager, Western Asset Management Company
Christine Benz, Director of Personal Finance, Morningstar Inc.

The tax man cometh and he will be collecting more from investors next year. This week’s Consuelo Mack WealthTrack features Western Asset Management’s top municipal bond investor Robert Amodeo and Morningstar’s personal finance guru Christine Benz, who suggest ways you can minimize the pain.

Consuelo Mack WealthTrack #926 “Global Opportunities”

Guests:
Rupal Bhansali, Chief Investment Officer, International Equities, Ariel Investments
David Rolley, Vice President, Global Fixed Income Group, Loomis Sayles & Company

Bonds are expensive and investors are fleeing stocks, so where should you invest? This week’s Consuelo Mack WealthTrack features global bond manager David Rolley from Loomis Sayles and global stock investor Rupal Bhansali from Ariel Investments, who discuss where they are finding the best investment opportunities.

Consuelo Mack WealthTrack #927 “Key Investment Decision”

Guests:
Mark Cortazzo, Senior Partner, MACRO Consulting; Founder, Flat Fee Portfolios
Charles Ellis, Founder, Greenwich Associates; Author, The Elements of Investing

What’s the most important investment decision you can make in the New Year? This week’s Consuelo Mack WealthTrack features a television exclusive with financial legend Charles Ellis and innovative financial planner Mark Cortazzo, who explain why cutting back on investment fees is the best way to insure higher returns.
Consuelo Mack WealthTrack #928 “Charitable Investments”

Guests:
Doug Bauer, Executive Director, The Clark Foundation
Jack Lund, President and CEO, YMCA of Greater New York

This week’s Consuelo Mack WealthTrack explores philanthropy as an investment. Two philanthropy thought leaders, Jack Lund, CEO of the YMCA of Greater New York, and Doug Bauer, Executive Director of the Clark Foundation, share advice on how to get the best return from your giving.

Consuelo Mack WealthTrack #929 “2013 Economy Exclusive, Part 1”

Guests:
Ed Hyman, Chairman and Founder, ISI Group
Dennis Stattman, Portfolio Manager, BlackRock Global Allocation Fund

This week Consuelo Mack WealthTrack features Anchor and Managing Editor Consuelo Mack’s annual television exclusive interview with “Financial Thought Leader” Ed Hyman, Wall Street’s number one-ranked economist for an unprecedented 30 years running, and BlackRock’s star Global Asset Allocation Fund Manager, “Great Investor” Dennis Stattman. They will assess the U.S. economy, markets, and investment opportunities for 2013. Part 1 of 2.

Consuelo Mack WealthTrack #930 “2013 Economy Exclusive, Part 2”

Guests:
Ed Hyman, Chairman and Founder, ISI Group
Dennis Stattman, Portfolio Manager, BlackRock Global Allocation Fund

This week Consuelo Mack WealthTrack presents game changers for 2013! In part two of Anchor and Managing Editor Consuelo Mack’s annual television exclusive interview with “Financial Thought Leader” Ed Hyman, Wall Street’s number one-ranked economist for an unprecedented 33 years running, he and “Great Investor” Dennis Stattman, long-time portfolio manager of BlackRock’s Global Allocation Fund, identify the three big issues they predict will make a huge positive difference to investors this year. Part 2 of 2.

Consuelo Mack WealthTrack #931 “Financial Thought Leaders: Andrew Lo”

Guest: Andrew Lo, Professor of Finance, MIT; Hedge Fund Manager

This week’s Consuelo Mack WealthTrack focuses on the sea change in the markets. “Financial Thought Leader” Andrew Lo, renowned professor of finance at MIT and hedge fund manager, says the markets are more complex and challenging than ever before. He shares strategies to survive and prosper.

Consuelo Mack WealthTrack #932 “Life Time Security”

Guests:
John Kim, Chief Investment Officer, New York Life Insurance Company; President, New York Life Investments Group
Nick Sargen, Chief Investment Officer, Fort Washington Investment Advisors; Chief Investment Officer, Western & Southern Financial Group

This week’s Consuelo Mack WealthTrack explores how to build financial security to last a lifetime. Two Chief Financial Officers of two top-rated insurance companies, New York Life’s John Kim and Western & Southern’s Nick Sargen, share their portfolio strategies.
Consuelo Mack WealthTrack #933 “Bill Miller Exclusive”

Guest: Bill Miller, Portfolio Manager, Legg Mason Capital Management Opportunity Trust

This week’s Consuelo Mack WealthTrack features a television exclusive with legendary value investor Bill Miller. The only mutual fund manager to beat the S&P 500 for 15 years in a row, Miller’s Legg Mason Capital Management Opportunity Fund was the number one mutual fund last year. Find out where he is investing now.

Consuelo Mack WealthTrack #934 “Income Protection”

Guests:
Charles de Lardemelle, Portfolio Manager, IVA Worldwide Fund
Edward Perks, Portfolio Manager, Franklin Income Fund

This week’s Consuelo Mack WealthTrack explores income and protection with two market and competition-beating fund managers. Franklin Income Fund has delivered monthly payments to shareholders since 1948! Portfolio Manager Edward Perks explains how he is carrying on the tradition and finding income in an income scarce world. IVA Worldwide Fund’s Charles de Lardemelle explains where he is finding value to protect and build shareholders’ purchasing power.

Consuelo Mack WealthTrack #935 “Great Investors: Mark Yockey”

Guest: Mark Yockey, Portfolio Manager, Artisan International Fund

This week’s Consuelo Mack WealthTrack features a rare interview with a “Great Investor” and former Morningstar International Stock Fund Manager of the Year winner. Artisan International Fund’s Mark Yockey discusses his contrarian picks and how he is finding sustainable growth in Japanese tobacco and automobile companies, Chinese internet and insurance firms, and global beer companies.

Consuelo Mack WealthTrack #936 “Financial Thought Leaders: John C. Bogle”

Guest: John C. Bogle, Founder, Vanguard; President, Bogle Financial Markets Research Center; Author, The Clash of the Cultures

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 #937 “Financial Thought Leaders: Michael Mauboussin”

Guest: Michael Mauboussin, Adjunct Professor of Finance, Columbia Business School; Author, The Success Equation

This week’s Consuelo Mack WealthTrack features “Financial Thought Leader” Michael Mauboussin, who explains the important roles luck and skill play in investment success and how to harness both to your advantage.

Consuelo Mack WealthTrack #938 “Maximizing Social Security Benefits”

Guest: Mary Beth Franklin, Contributing Editor, InvestmentNews

This week’s Consuelo Mack WealthTrack reveals how to maximize your Social Security benefits, the only source of guaranteed income most Americans can count on. Award-winning financial planner and retirement expert Mary Beth Franklin shares how to get the most out of social security for you and your loved ones.
Consuelo Mack WealthTrack #939 “Great Investors: Mark Headley”

Guest: Mark Headley, Chairman, Board of Directors, Matthews International Capital Management; Portfolio Manager, Matthews Pacific Tiger Fund

This week’s Consuelo Mack WealthTrack features a rare television interview with “Great Investor” Mark Headley of Matthews Asia. The Asia investing pioneer will explain why this could be the year of China as it transitions to new leadership and a consumer-driven economy.

Consuelo Mack WealthTrack #940 “Financial Thought Leaders: Robert Shiller”

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

Why is renowned Yale economist Robert Shiller, who predicted the bursting of the tech and housing bubbles, now calling the bond market “dangerous?” A “Financial Thought Leader” and visionary, Shiller shares his views and advice on the stock, bond and housing markets on this week’s Consuelo Mack WealthTrack.

Consuelo Mack WealthTrack #941 “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 #942 “Great Investors: Ken Heebner”

Guest: Ken Heebner, Co-founder, Capital Growth Management; Portfolio Manager, CGM Focus Fund

This week’s Consuelo Mack WealthTrack features legendary portfolio manager Ken Heebner, who is known for his big bets and rapid trading at the CGM funds. He shares his contrarian views on the U.S. economy and stocks, particularly housing and banking, and why he thinks bonds are so dangerous.

Consuelo Mack WealthTrack #943 “Great Investors: Ben Inker”

Guest: Ben Inker, Co-head, GMO Asset Allocation Team

This week’s Consuelo Mack WealthTrack features a rare interview with next generation “Great Investor” Ben Inker, co-head of GMO’s Asset Allocation Team. Inker explains why he is increasing GMO’s cash levels and treading very carefully in both the stock and bond markets.

Consuelo Mack WealthTrack #944 “Great Investors: Charles Royce”

Guest: Charles Royce, President, Royce & Associates; Portfolio Manager, The Royce Funds

This week’s Consuelo Mack WealthTrack features an exclusive interview with small-company stock pioneer Charles “Chuck” Royce. The Royce Fund’s “Great Investor” shares his 40 years of lessons learned in the markets, including what’s changed and what still works for long-term investment success.
Consuelo Mack WealthTrack #945 “Financial Thought Leaders: Charles Ellis”

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 #946 “Best Dividends”

Guest: Robert Shearer, Lead Portfolio Manager, BlackRock Equity Dividend Fund

This week’s *Consuelo Mack WealthTrack* explores why not all dividends are created equal. Robert Shearer, lead portfolio manager for BlackRock’s Equity Dividend Fund, explains why some dividends are better than others and where he is finding the best in growth and income.

Consuelo Mack WealthTrack #947 “Great Investors: Robert Kleinschmidt”

Guest: Robert Kleinschmidt, Portfolio Manager, Tocqueville Fund

This week’s *Consuelo Mack WealthTrack* features an exclusive interview with “Great Investor” Robert Kleinschmidt. Tocqueville Fund’s contrarian portfolio manager discusses where he is betting against the herd to stay ahead of it.

Consuelo Mack WealthTrack #948 “Investing Globally”

Guests:
Tim Hartch, Co-head Domestic Equity Team, Portfolio Manager, Brown Brothers Harriman
William Priest, CEO, Epoch Investment Partners

This week on *Consuelo Mack WealthTrack* two global investors with world class track records reveal where they are finding opportunities now. Epoch Investment Partners’ William Priest searches for yield in a wide universe and Brown Brothers Harriman’s Tim Hartch keeps a narrow focus.

Consuelo Mack WealthTrack #949 “Charitable Investments”

Guests:
Doug Bauer, Executive Director, The Clark Foundation
Jack Lund, President and CEO, YMCA of Greater New York

This week’s *Consuelo Mack WealthTrack* explores philanthropy as an investment. Two philanthropy thought leaders, Jack Lund, CEO of the YMCA of Greater New York, and Doug Bauer, Executive Director of the Clark Foundation, share advice on how to get the best return from your giving.

Consuelo Mack WealthTrack #950 “Financial Thought Leaders: Robert Shiller”

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

Why is renowned Yale economist Robert Shiller, who predicted the bursting of the tech and housing bubbles, now calling the bond market “dangerous?” A “Financial Thought Leader” and visionary, Shiller shares his views and advice on the stock, bond and housing markets on this week’s *Consuelo Mack WealthTrack*. 
Consuelo Mack WealthTrack #951 “Global Opportunities”

Guest: Stephen Smith, Co-Lead Portfolio Manager, Brandywine Global Opportunities Bond Fund

This week’s Consuelo Mack WealthTrack features an exclusive interview with Brandywine Global Opportunities Bond Fund’s “Great Investor” Stephen Smith, a maverick bond investor who delivers stock market-like returns.

Consuelo Mack WealthTrack #952 “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.