



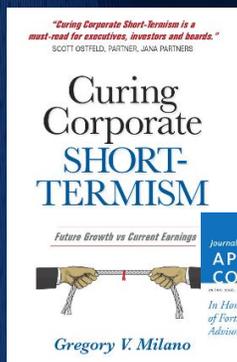
## Create More Value Leadership Workshop

For optimal learning we limit the number of participants per class. **REGISTER NOW** to secure a seat.

Enrollment closes on **December 15.**

- ❖ Visit the [Fortuna Events page](#) to view seminar details.
- ❖ Learn more about [Fortuna Advisors](#).
- ❖ Explore our latest [publications](#).

### The Playbook for Modern Value Creation



# Making What's Good for Investors and the Company, Good for Employees and Their Families



Friday, January 16, 2026



8:30 AM – 1:30 PM



Brookfield Place, Wall Street District  
200 Vesey Street, 24<sup>th</sup> Floor, New York, NY

## COURSE OBJECTIVE

### Better Insights

Discover where value is truly being created or destroyed through a singular measure that provides clear signals and a common language for better decisions.

### Better Decisions

Apply a structured resource allocation framework that balances growth and return by ranking opportunities objectively and ensuring resources go where they can create the most value.

### Better Behaviors

Foster an ownership culture where value-linked incentives drive owner-like behaviors at all levels, aligning what's good for the company and investors with what's good for employees and their families.

## INTENDED AUDIENCE

This seminar is designed for CEOs, CFOs, and senior leaders in finance or strategy.

## SEMINAR PACKAGE

- Light refreshments and a catered lunch
- Complimentary company analysis using Fortuna Advisors' cash-based measure of economic profit (NDA available for privately held companies)
- Copy of Curing Corporate Short-Termism by Fortuna Advisors CEO Greg Milano
- Special issue of the Journal of Applied Corporate Finance featuring the best of our thought leadership
- **Registration fee:** \$2,500 per participant; group rates available

**AGENDA**

**TOPICS COVERED**

**9:00 – 10:00**

**1. The Hidden Metric Behind Shareholder Returns**

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- Establishing a common language and single source of truth that embodies what it means to create value
- Recognizing and avoiding the pitfalls of traditional measures that can unintentionally destroy value

**10:00 – 10:30**

**2. Making Smarter Operating Decisions for Lasting Value**

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- Linking day-to-day operating decisions directly to short and long-term value creation
- Understanding how RCE provides a clear line of sight from leadership decisions to the shop floor
- Identifying and overcoming the common biases that often lead to poor decision making

**10:30 – 10:45**

..... **Coffee Break** .....

**10:45 – 11:45**

**3. Value Creation Strategy Framework for Superior Returns**

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- Combining growth and efficiency in a disciplined way to generate sustainable value creation
- Applying the Value Creation Matrix to separate value-creating strategies from those that erode value
- Exploring strategic choices and archetypes that have the greatest impact on long-term Total Shareholder Return (TSR)

**11:45 – 12:30**

**4. Driving Better Behaviors Through an Ownership Culture**

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- Examining why traditional incentive plans often fall short in driving lasting performance
- Designing incentive structures that encourage accountability and motivate ownership behavior
- Balancing the pressure for short-term results with the discipline to sustain long-term value creation

Creating long-term shareholder value requires more than quarterly results. This half-day seminar provides senior executives with a clear framework to measure, communicate, and grow value. Through an interactive format, participants learn to apply value-based metrics, balance growth and profitability, and engage leaders in decisions that drive shareholder returns.

Registration begins at 8:30 am. The class runs from 9:00 am to 12:45 pm, with a 15-minute coffee break in the morning and a 45-minute lunch offered after the sessions.

**Create More Value  
Leadership Workshop**

*In this seminar, you'll discover the same powerful frameworks and tools we use with our clients. These battle-tested, practical solutions consistently drive measurable success for top-tier companies.*

**What Clients Think**

*"Fortuna's work led us to actions that created \$4 billion in wealth creation."*

*"The Fortuna team brought a holistic view of value creation across the company, enabling an ownership culture at all levels, including the Board."*

*"Fortuna flipped our investment review conversations from financial targets to strategic value and feasibility, gaining operators' commitment."*

*"Incorporating Fortuna's methodology into our strategic planning to operating actions, capital allocation and performance measurement . . . helped transform our way of doing business."*

**COURSE LEADERS**

**Gregory V. Milano, Founder & CEO**

[gregory.milano@fortuna-advisors.com](mailto:gregory.milano@fortuna-advisors.com)

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Greg is the Founder and CEO of Fortuna Advisors with more than 30 years of experience in value-based management, corporate finance, and strategy. He advises boards and executive teams on performance measurement, capital allocation, and incentive design, linking strategy and execution to long-term shareholder value. At Fortuna, he has led engagements across industries, helping organizations improve resource allocation, strengthen financial communication, and embed value-based decision-making into their culture.

Before founding Fortuna in 2009, Greg was a Managing Director at Credit Suisse and a Partner at Stern Stewart & Co., where he led the North America division. He is the author of *Curing Corporate Short-Termism; Future Growth vs. Current Earnings* and host of the *Create More Value* podcast, with work regularly featured in the *Journal of Applied Corporate Finance*, *Forbes*, *CFO Magazine*, *Fortune*, and *The Wall Street Journal*. Greg holds an MBA in finance from NYU Stern and a B.S. in mechanical engineering from Rensselaer Polytechnic Institute.

**Marwaan R. Karame, Partner**

[marwaan.karame@fortuna-advisors.com](mailto:marwaan.karame@fortuna-advisors.com)

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Marwaan, a Partner at Fortuna Advisors, leverages over 20 years of expertise in strategy and behavioral corporate finance to drive transformative results. Collaborating with CEOs, CFOs, and leadership teams, he helps make what's good for investors and the company, also good for employees and their families.

Using data-driven insights, Marwaan guides large and mid-sized companies across diverse industries (public and private) to adopt a proven value-creation framework. This change management playbook allows employees to share in the value created by strategically allocating resources towards the most productive users and uses of financial, physical, and intellectual capital.

Prior to joining Fortuna, Marwaan began his career at Stern Stewart & Co. before joining the investment banking division of DLJ, and later, Credit Suisse. He also served as a Managing Partner at IDG Capital Group, driving strategic initiatives. He holds a B.Sc., double majoring in Mathematics and Economics, with a minor in Psychology from St. Lawrence University and an MBA in Finance from the Ivey Business School at Western University.

**VENUE**

**LOCATION AND VENUE DETAILS**

The seminar will be held at Brookfield Place in Lower Manhattan, a modern waterfront complex overlooking the Hudson River and Statue of Liberty. The boardroom offers an inviting space for discussion and collaboration, with a catered lunch provided.



**GETTING THERE**

Brookfield Place is easily accessible by public transit and car. From Midtown, take the **4 or 5 train to Fulton Street**, then walk ten minutes west to the venue. The **PATH train** from New Jersey stops at the **World Trade Center**, just a five-minute walk away. Taxis and rideshares from Midtown typically take 15–20 minutes, and the trip from JFK or LaGuardia is about 40 minutes. **Paid parking** is available in the Brookfield Place garage, accessible from Vesey Street.

**NEARBY ATTRACTIONS**

Enjoy some of New York’s most iconic landmarks just steps away, including **One World Observatory**, the **Brookfield Place Winter Garden**, **Battery Park**, and the **9/11 Memorial & Museum**.



**HOTELS NEARBY**

- ❖ Conrad New York Downtown
- ❖ The Beekman, a Thompson Hotel
- ❖ Four Seasons Hotel New York Downtown
- ❖ Marriott Downtown