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CONVERGENCE.INSIGHT.PERSPECTIVE.

AIMSE 2014 FALL CONFERENCE  
OCTOBER 15-16, 2014  
THE PRINCETON CLUB  
NEW YORK, NY

CONFERENCE PROGRAM

# CON VER GEN CE IN SIGH T PER SPEC TIVE



CONVERGENCE.INSIGHT.PERSPECTIVE.

AIMSE 2014 FALL CONFERENCE  
OCTOBER 15-16, 2014  
THE PRINCETON CLUB  
NEW YORK, NY

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## SCHEDULE

# WEDNESDAY OCTOBER 15

1:00 – 6:00 pm

Second Floor Foyer

## Registration

2:00 – 2:10 pm

James Madison Room

## Welcome Remarks

### Conference Co-Chairs

**Brian Crowell, CFA**, Managing Director  
**AQR Capital Management**

**Greg Weissman**, Director, Consultant Relations  
**Putnam Investments**

### AIMSE President

**Scott Kearney**, Senior Vice President,  
Head of Institutional Sales, Retirement Solutions  
**F-Squared Investments**

2:10 – 3:10 pm

James Madison Room

## The Evolving Role of Alternatives

### Speakers

**John Lake, CFA**, Senior Vice President

**Summit Strategies Group**

**Whitney Mishler, CFA**, Vice President, Portfolio Manager

**The Permal Group**

**Christopher Mulshine**, Managing Director, Head of U.S. Capital Services  
**Credit Suisse LLC**

### Moderator

**Chris Rae**, Managing Director, Head of Business Development

**Sorin Capital Management, LLC**

Recently, CalPERS, the largest US public pension announced that it was dropping hedge funds from its portfolio. Dutch pension PMT made a similar announcement.

- What does the future hold for alternatives?
- Is this risk reward benefit worth the cost?
- If traditional markets continue to perform, what is the evolving role of alternatives?
- Is the alternative world becoming more traditional with the ascendancy of '40 Act liquid alternatives and UCITS structures?
- How will the regulatory environment continue to change and evolve?

This panel will seek to explore these questions and more regarding the evolving role of alternatives.

3:10 – 3:30 pm

Alexander Hamilton Room

## Networking Break with Exhibitors

### Sponsored by:



3:30 – 5:00 pm

James Madison Room

**Featured Consultant: NEPC****Speaker****Timothy Bruce**, Director of Traditional Research, Partner**Moderator****Deborah Drachman**, Head of US Consultant Relations**Standard Life Investments**

AIMSE is proud to present Timothy Bruce, Director of Traditional Research of NEPC as our featured consultant.

Tim joined NEPC in 2008. As director of traditional research at NEPC, Tim oversees a broad area of investment research spanning equities, fixed income, and real assets. Tim is also active in NEPC's investment research and due diligence activities in alternative investments with a particular focus on hedged equity strategies. Outside of his formal research responsibilities, Tim provides consulting services for both traditional and non-traditional asset classes of various public, corporate, Taft-Hartley and endowment/foundation clients.

Tim is a member of NEPC's International Equity Advisory Group, Traditional Research Group, and the Alternative Asset Due Diligence Committee. A frequent conference speaker, Tim has authored multiple white papers across a broad range of asset classes and investment strategies while at NEPC.

NEPC is 100% employee-owned with 34 partners. They have 321 clients with \$809 billion in total assets with a thriving business of 28 consecutive years of superior client ratings. NEPC is celebrating 28 years as an industry leader in the investment consulting industry with a mission "to work constructively with the asset management community to deliver innovative and high quality investment strategies that meet and exceed their clients' objectives".

5:00 – 6:00 pm

Alexander Hamilton Room

## Reception

6:00 – 8:00 pm

James Madison Room

## Dinner

### Guest Speaker

**John Sileo**

*Think Like a Spy: Aggressive Identity Theft & Fraud Countermeasures*

### Moderator

**Peter Whitlock**, Partner

**Century Capital Management, LLC**

Identity theft and online fraud are destructive side effects of **information over-exposure**. Due to the power of personally identifying information, we must leverage formidable tools to protect everything from Social Security numbers to bank accounts, from passwords to intellectual property. John delivers those exact tools in a **highly interactive, surprisingly humorous** presentation inspired by his own life-changing battles with identity theft and privacy exposure. John will help you “own” your identity—to **take responsibility for the sensitive data that represents your wealth**.





# THURSDAY OCTOBER 16

7:30 am – 5:30 pm

Second Floor Foyer

## Registration

7:30 – 8:00 am

Alexander Hamilton Room

## Continental Breakfast with Exhibitors

8:00 – 9:00 am

James Madison Room

## Smart Beta—Definition Through Application

### Speakers

**Fabio Cecutto, CFA**, Senior Investment Consultant, Manager Research  
**Towers Watson Investment Services, Inc.**

**Anurag Pandit, CFA**, Director of Investments  
**Boston Children's Hospital**

**John Regan**, Chief Investment Officer  
**Permanens Capital**

### Moderator

**Matthew Yannocone**, Director, Institutional Sales  
**WisdomTree Asset Management, Inc.**

Debate over the definition of Smart Beta has been plentiful as of late, and with no clear-cut answer, is there a better way of coming to a conclusion? Institutional investors of all types are beginning to incorporate alternatively-weighted indexes into their portfolio's and maybe that's where the answer lies. Our panel of industry experts will discuss the thought process of filtering through the broadly-defined term of Smart Beta, and investing in those that best fit within the confines of an institutional investment portfolio.

9:00 – 10:30 am

Alexander Hamilton Room

**Consultant Roundtables****Consultants**

**Chris Solarz**, Managing Director  
**Cliffwater LLC**

**Zornitza Taleva, CAIA**, Senior Consultant  
**Hewitt EnnisKnupp**

**Leena Shah, CFA**, Principal  
**Mercer**

**Rob Balkema, CFA**, Portfolio Manager, Multi-Asset Solutions  
**Russell Investments**

**Alan Kosan, JD**, Senior Vice President, Head of Alpha Investment Research  
**Segal Rogerscasey**

**Texas Hemmaplardh, CFA**, Principal  
**Slocum**

**Christopher Thompson, CFA**, Senior Investment Consultant  
**Towers Watson**

**Moderator**

**Miriam Tai, CFA, CAIA**, Global Head of Consultant Relations  
**Itau USA Asset Management Inc.**

A hallmark of the AIMSE conferences, the consultant roundtables are always one of the most popular sessions. Join us for an interactive and candid discussion with leading global consultants from both traditional and alternative investments. Come with your questions and hear top consultants share their thoughts on what investors are doing, which asset classes are in demand and how to get (and keep) your products on the radar. There's no formality — just you and your fellow marketers discussing manager search activity, organizational updates, new trends in the consulting industry, how best to communicate with these influential consultants and more. You'll gain great insights from a wide array of top consulting firms and begin the process of building relationships with these key people in an intimate and interactive setting. Don't miss this opportunity for you and your peers to have a direct dialogue with consultants on the key topics and issues confronting marketing professionals today.



10:30 – 11:00 am

Alexander Hamilton Room

## Networking Break with Exhibitors

11:00 – 12:00 Noon

James Madison Room

## Defined Contribution – The Growing Delegated/OCIO Market

### Speakers

**Scott Brooks, CFA**, Managing Director, Head of Defined Contribution Institutional Group

**SEI**

**Kevin Knowles, CFA**, Product Manager, Defined Contribution  
**Russell Investments**

**Liana Magner, CFA**, Partner, US Delegated DC Leader  
**Mercer**

### Moderator

**Michael Raso**, Senior Vice President, Institutional Retirement and Subadvisory  
**Old Mutual Asset Management**

This panel will address:

- Why Plan Sponsors are outsourcing their DC plans
- The opportunity for Asset Managers in this “new” channel
- Walking the fine line between Consultant and Fiduciary
- The next big leap for the DC market?

12:00 Noon – 1:00 pm

Alexander Hamilton Room

## Networking Lunch

Sponsored by:

**Pensions&Investments**

1:00 – 1:45 pm

James Madison Room

## Industry Trends, Challenges and Opportunities

### Speakers

**Gordon Dickinson**, Senior Vice President, Institutional Consulting Group  
**Callan Associates**

**Judy McKinney**, Executive Vice President & Manager,  
Institutional Consulting Group  
**Callan Associates**

### Moderator

**Ted Doyle**, Senior Vice President, Institutional Sales & Service  
**Fred Alger & Company, Incorporated**

We are delighted to have Callan share their insights with a strategic overview of the asset management industry. As industry veterans, Judy and Gordon will discuss key trends, challenges and opportunities so that we can better position our investment strategies and analyze the challenges and opportunities of the current investment landscape.

1:45 – 2:45 pm

James Madison Room

## Endowments & Foundations, Family Offices and the Role of Alternatives

### Speakers

**James Jayko**, Portfolio Manager  
**Dock Street Capital**

**Julia Mord, CAIA**, Director, Investments  
**Tulane University Investment Management Office**

**Chris Roy**, Director, Client Advisory Group  
**Windrose Advisors**

### Moderator

**Adam Duncan**, Senior Investment Director  
**Cambridge Associates**

Investors have enjoyed a generally benign, low volatility world over the last several years. Accommodative monetary policy across most of the world has led equity prices to rise to near all-times highs. However, with all of that price appreciation, we are now in an environment where forward-looking returns are lower than normal

and there are question marks around future growth and the impact of rising rates. As many Endowment, Foundations and Family Offices look to generate attractive returns and protect purchasing power, they are continuing to look towards Alternatives to help achieve their goals. This panel discussion will address Alternative strategies that E&F and Family Office investors are considering and implementing to boost risk-adjusted returns and combat any unexpected up-ticks in inflation.

2:45 – 3:45 pm

James Madison Room

## Veteran's Panel

### Speakers

**Christopher Newman, CFA**, Vice President, Institutional Sales  
**T. Rowe Price Associates, Inc.**

**Carolyn Patton, CFA**, Managing Director and Head of Consultant  
Relations, Americas  
**Deutsche Asset & Wealth Management**

**Mark Sullivan**, Director, Institutional Sales & Relationship Management  
**Stralem & Company**

### Moderator

**Michael Gillis**, Senior Vice President, Business Development  
**Greystone Managed Investments, Inc.**

Listen to a panel of veterans share their experience and talk about what helps differentiate you and your firm in the marketplace. Bring your questions for an open forum with a panel ready to share years of experience.

3:45 – 4:15 pm

Alexander Hamilton Room

## Networking Break with Exhibitors



4:15 – 5:15 pm

James Madison Room

## Defined Contribution Industry Survey

### Speaker

**Jeri Savage**, Managing Director, Defined Contribution Research  
**Rocaton Investment Advisors**

Rocaton Investment Advisors and Pensions & Investments conducted a survey to gather the perspective of approximately 450 defined contribution industry professionals at asset management, recordkeeping and consulting firms. These real-time insights can help inform plan sponsors and others of the potential direction in which the industry may be headed regarding a variety of topics and shed light on changing viewpoints and emerging best practices.

In this Rocaton Insights we discuss the survey respondents' views on improving participant outcomes, conservative investment options, custom target date funds, new areas of focus, revenue sharing, as well as the respondents' own behaviors, and the implications for plan sponsors.

5:15 – 5:30 pm

James Madison Room

## Closing Remarks

### Conference Co-Chairs

**Brian Crowell, CFA**, Managing Director  
**AQR Capital Management**

**Greg Weissman**, Director, Consultant Relations  
**Putnam Investments**

### AIMSE President

**Scott Kearney**, Senior Vice President, Head of Institutional Sales,  
Retirement Solutions  
**F-Squared Investments**

5:30 – 7:15 pm

Alexander Hamilton Room

## Closing Reception



## CONFERENCE CO-CHAIRS



### **Brian Crowell, CFA** | Managing Director | **AQR Capital Management**

Brian leads AQR's Consultant Relations team. Brian, who holds the Chartered Financial Analyst designation, joined AQR in 2007 as a member of the firm's Portfolio Solutions Group, where he worked with the firm's institutional clients on a broad range of investment policy issues, and was co-author of a paper published in the *Journal of Investment Strategy*. Brian currently serves as a member of AQR's Long-Only Investment Committee and on the board of the Association of Investment Management Sales Executives. He earned an A.B. in chemistry from Dartmouth College and an M.B.A. with concentrations in analytic finance, economics and accounting from the University of Chicago Booth School of Business.



### **Greg Weissman** | Director, Consultant Relations | **Putnam Investments**

Mr. Weissman is a Consultant Relations Director for Putnam Global Institutional Management. In this role, he is responsible for managing relationships with investment consultants in the Eastern region of the United States. Mr. Weissman, who holds his Series 7 and 63 licenses with FINRA, is on the board of Proctor Academy and the Association of Investment Management Sales Executives (AIMSE). He joined Putnam in 2011 and has been in the investment industry since 2000. Past experience includes Old Mutual Asset Management as Senior Vice President, Director of Consultant Relations and Cowen & Company, Jefferies, Pacific Crest Securities, SoundView Technology Group. Mr. Weissman received his B.B.A. from Southern Methodist University, B.B.A.

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## MODERATORS & SPEAKERS



### **Rob Balkema, CFA** | Portfolio Manager, Multi-Asset Solutions **Russell Investments**

Based in New York, Rob is a Portfolio Manager working on Russell's multi-asset funds. In this role Rob helps manage Russell's Fiduciary Solutions mandates which integrate Russell's equity, fixed income, real asset, and alternatives capabilities globally. He is tasked with creating strategic asset allocations for the portfolios, selecting active strategies or passive alternatives to populate asset classes, and dynamically positioning the total portfolio in order to help clients achieve their objectives.

Previously, Rob was a senior analyst in the investment process and risk group for the investment division at Russell Investments. In this role, Rob focused on improving the measurement, evaluation, and enhancement of Russell's portfolio management practice.

Based in Seattle from 2006 until 2009, Rob was a member of the global equity team, serving in multiple capacities. He was responsible for evaluating asset management firms worldwide that offer global, international and emerging market equity mandates and supported portfolio managers in the structuring and monitoring of Russell's global equity strategies.

Rob holds a B.A. in Economics from Harvard College and is a member of the CFA® Society of Seattle. He also serves on the board of Covenant House NY, a non-profit organization charged with serving NY homeless youth.



**Scott Brooks, CFA** | Managing Director, Head of Defined Contribution Institutional Group | **SEI**

Scott Brooks serves as Managing Director for the Defined Contribution Team. He is responsible for SEI's defined contribution (DC) business and strategic positioning within this market segment. Scott leads the Defined Contribution Team in the ongoing strategy, development and execution of SEI's DC solution to the corporate, nonprofit, government and multiemployer plan markets.

Prior to joining SEI, Scott served as the Head of U.S. Defined Contribution for Deutsche Asset & Wealth Management's Global Client Group – Alternatives, where he led distribution and relationship management for the firm's real estate and infrastructure capabilities. He has also held business leadership positions at JPMorgan Asset Management, Managers Investment Group and OppenheimerFunds, Inc.



**Timothy Bruce** | Director of Traditional Research, Partner | **NEPC**

Tim joined NEPC in 2008. As director of traditional research at NEPC, Tim oversees a broad area of investment research spanning equities, fixed income, and real assets. Tim is also active in NEPC's investment research and due diligence activities in alternative investments with a particular focus on hedged equity strategies. Outside of his formal research responsibilities, Tim provides consulting services for both traditional and non-traditional asset classes of various public, corporate, Taft-Hartley and endowment/foundation clients.

Tim is a member of NEPC's International Equity Advisory Group, Traditional Research Group, and the Alternative Asset Due Diligence Committee. A frequent conference speaker, Tim has authored multiple white papers across a broad range of asset classes and investment strategies while at NEPC.





Prior to joining NEPC, Tim was an Investment Analyst for the \$12 billion dollar Partners Healthcare Investment Office. At Partners, Tim was responsible for conducting investment research and analysis for the institutions' endowment and pension fund. He specialized in foreign equity and hedge fund investments and was accountable for foreign equity, hedge fund allocations, portfolio construction and investment selection.

Tim received his MBA from The University of Chicago Booth School of Business, with concentrations in Finance and Strategic Management. Tim received his B.A. in Economics from Brown University.



**Fabio Cecutto, CFA** | Senior Investment Consultant, Manager Research  
**Towers Watson Investment Services, Inc.**

Fabio heads the International Equity manager research team at Towers Watson in New York. He has experience in researching equity managers globally with a particular expertise in quantitative and Smart Beta equity approaches. Fabio consults globally to a number of Towers Watson clients on equity selection and portfolio allocation. In his role as equity specialist, Fabio is a member of Towers Watson's US Portfolio Construction Group (PCG).

Fabio has a MSc in Economics and Finance from the Bocconi University in Milan, Italy and is a CFA charterholder.



**Gordon Dickinson** | Senior Vice President | **Callan Associates**

Gordon E. Dickinson is a Senior Vice President in Callan's Institutional Consulting Group. Gordon consults to investment management organizations in the areas of product evaluation and analysis, evaluation and enhancement of client servicing, new business development and organizational analysis. He is a shareholder of the firm.

Gordon began his career with Callan in 1987 as a consultant in Callan's Chicago office advising clients on the development of strategic investment solutions in the areas of asset allocation and policy statements, manager research and selection and performance evaluation. He had consulting responsibilities for both defined benefit and defined contribution plans for public retirement systems and large multi-national corporations.

Prior to joining Callan, Gordon served as an Investment Consultant to public and corporate pension funds for Wilshire Associates. He was previously a Senior Consultant with Arthur D. Little, Inc. where he was involved with valuing privately held corporations for acquisition and divestiture purposes.

Gordon earned an MBA in Finance from the University of California at Los Angeles' Anderson School of Management and an M.A. in English from the University of California at Santa Barbara. He graduated from the University of Wisconsin with a B.A. in English.



**Ted Doyle\*** | Senior Vice President, Institutional Sales & Service  
**Fred Alger & Company, Incorporated**

Ted Doyle is a Senior Vice President in Institutional Sales & Service. He joined Alger in 2008 and has 12 years of experience. Previously, he was Senior Manager at Ark Asset Management where his responsibilities included institutional marketing, consultant relations, and client servicing. Prior to Ark Asset Management, Ted worked as a sales executive at Bloomberg L.P.

Ted served five years as an officer in the United States Army with the 4th Infantry Division, Fort Hood, Texas. His duties in the Army included Platoon Leader and aide-de-camp to the Assistant Division Commander for Maneuver. He resigned his commission as a Captain at the conclusion of his service commitment. Ted previously served as a class agent for The Hotchkiss School in Lakeville, Connecticut and as a member of the Board of Governors for the West Point Society of New York.

Ted graduated with a B.S. from the United States Military Academy where he was also a member of the Division I Ice Hockey program. He is FINRA series 6, 7, 26, & 63 licensed and currently resides in New York City.



**Deborah Drachman\*** | Head of US Consultant Relations  
**Standard Life Investments**

Deborah Drachman is the Head of US Consultant Relations for Standard Life Investments. She is responsible for developing and maintaining relationships with key institutional investment consultants.

Prior to joining Standard Life Investments, Debbie worked at Citadel, ING Investment Management and SG Cowen Asset Management as a marketing and client service professional. She started her career in investment consulting at SEI and William M. Mercer.

She holds a B.A. in political science from Syracuse University and is FINRA Series 7 and 63 licensed.



**Adam Duncan** | Senior Investment Director | **Cambridge Associates**

Adam Duncan is a Senior Investment Director with Cambridge Associates in Boston. Prior to joining Cambridge, he spent most of his career in trading, structuring, and sales of fixed income and foreign exchange derivatives. He spent 12 years at JP Morgan Chase and 2.5 years at Credit Suisse prior to joining Cambridge. He holds a B.S. in Information and Decision Systems from Carnegie Mellon University and a M.S. from the Graduate School of Industrial Administration at Carnegie Mellon.



**Michael Gillis\*** | Senior Vice President, Business Development  
**Greystone Managed Investments, Inc.**

Michael Gillis is Senior Vice-President, Business Development of Greystone Managed Investments Inc.

Immediately prior to joining Greystone, Michael held the position of Vice-President Institutional Marketing and Sales for a number of years with Seamark Asset Management. Previously, he worked for the Halifax Grammar School for 2 years, as a Teacher. Michael has also worked as a Director of Business Development for National Trust, and has held the position of Senior Account Representative for both Royal Trust and National Trust.

Michael's professional credentials include a Bachelor of Education, which he completed at Mount Saint Vincent University and a Bachelor of Business Administration, which was obtained from St. Francis Xavier University.

Michael is also an active board member for the Association of Investment Management Sales Executives (AIMSE) and Benefits and Pensions Monitor. Michael is also actively involved in the Canadian Benefits and Pension Institute (CPBI), the Association of Canadian Pension Managers (ACPM), the Canadian Association of University Business Officers (CAUBO), and the International Foundation of Employee Benefits (IFEBP). Michael serves on the board of two charities, MAGICANA and Georgetown Walk for Wishes (Ontario).



**Texas Hemmaplardh, CFA** | Principal | **Slocum**

Texas joined Slocum in 1997. He has expertise in capital markets research and portfolio construction across multiple asset classes, particularly the integration of alternative investments into diversified risk-controlled portfolios. He frequently makes presentations to institutional investors on asset allocation and alternative investments. Texas began at Slocum as an Analyst and eventually moved to the Research Team. On the Research Team, Texas rose to the position of Director of Global Fixed Income Research, and then held the roles of Director of Alternative Investments and Director of Hedge Fund Strategies, before returning to client service as a Principal and Practice Leader on Slocum's Endowment and Foundation Team.

Prior to joining Slocum, Texas worked as Finance Director for GlobalLearn, Inc., a not-for-profit educational internet company in Connecticut. Texas holds a B.A. in Economics from Yale University, an MBA (with honors) from the University of Chicago's Booth School of Business, and was in the Advanced Studies Program at Oxford University. He is a Chartered Financial Analyst Charterholder (CFA).



**James Jayko** | Portfolio Manager | **Dock Street Capital**

James Jayko attended the Virginia Military Institute and worked for IBM after college. He completed his MBA at Georgia Tech and started working for SEI as an analyst on their Alternative Investment team. In 2011, he joined Dock Street Capital, a single family office as a portfolio manager, principally responsible for Absolute Return strategies. Mr. Jayko has had research featured in the *Wall Street Journal*, *CFO Magazine*, and the *Journal of Pension Economics and Finance*.



**Kevin Knowles, CFA** | Product Manager, Defined Contribution  
**Russell Investments**

Kevin is responsible for the product management and development efforts for the target date and real asset funds as well as customized retirement solutions. He joined Russell in 2013 from Allianz Global Investors, where over a 5-year career was most recently responsible for the product management and strategic positioning of the Allianz target date and target risk funds.

Kevin joined the investment industry in 2007, with the past several years concentrating on defined contribution investments. He graduated from Loyola University Maryland with a major in finance and a minor in mathematical sciences. He holds FINRA Series 7 and 63 licenses, is a CFA Charterholder and a member of the New York Society of Securities Analysts (NYSSA).

B.B.A. Finance, Loyola University Maryland

CFA Charterholder, CFA Institute

Licensed Registered Representative, FINRA Series 7 and 63  
(Russell Financial Services, Inc., member FINRA)



**Alan Kosan, JD** | Senior Vice President, Head of Alpha Investment Research | **Segal Rogerscasey**

Mr. Kosan is a Senior Vice President and the Head of Alpha Investment Research in Segal Rogerscasey's Darien office. The Alpha Investment Research group is responsible for all Fundamental/Quantitative Manager Research. Mr. Kosan has over 20 years of alternative investment experience and, as part of his current responsibilities, heads the firm's Alternatives Investment Research group, which includes private equity, hedge funds, real estate, infrastructure, commodities, natural resources, and opportunistic investments. He chairs the Alpha Manager Review Committee, which is responsible for manager ratings, and oversees Segal Rogerscasey's fully discretionary alternative investment account portfolios. Mr. Kosan also serves as a member of the firm's Strategic Advisory Committee.

Prior to joining Segal Rogerscasey, Mr. Kosan was Director, Consultant Relations and Institutional Marketing for Henderson Global Investors North America, a multi-asset-class investment manager. His responsibilities at Henderson included serving as the lead product specialist for the firm's Global Private Equity Fund of Funds in North America and advisor to the Investment Committee, and as the Director of a diversified, open-end comingled real estate fund. Before Henderson, Mr. Kosan was the head of the Alternative Investment portfolios at both the Philip Morris and United Technologies Corporation pension funds. Earlier in his career, he served in a variety of management positions with both real estate and private investment groups. Mr. Kosan has also served on a number of private equity and real estate fund Advisory Boards.

Mr. Kosan graduated with a B.A. summa cum laude with distinction, from Boston University's College of Liberal Arts and a Juris Doctor degree from Emory University School of Law. He currently sits on the United Way of the Capitol Region and Connecticut Public Broadcasting, Inc. (CPTV) Endowment Investment Committees.

Published works and speeches include "The Big Global Investment Issues," Frontier Advisors Annual Conference 2014, June 2014 and "Private Equity Performance Perspective," Institute for Fiduciary Education, 2013.


**John Lake, CFA | Senior Vice President | Summit Strategies Group**

John is a Senior Vice President in the Manager Research department. He leads the Hedge Fund group in Manager Research and has been with the firm for 11 years. He is responsible for hedge fund due diligence, manager selection, portfolio construction and monitoring. Prior to joining the firm in 2002, John worked for Banc of America Capital Management where he was associate portfolio manager/research analyst on the Nations MidCap Growth Fund. John received his B.A. in history from Marquette University and his MBA from Washington University's John M. Olin School of Business. He is a CFA charterholder and member of the CFA Society of St. Louis.


**Liana Magner, CFA | Partner | Mercer**

Liana Magner is a Partner, senior investment consultant and the US Delegated DC Leader for Mercer Investments. Liana has overall responsibility for the ongoing development of Mercer's Outsourced CIO unit, as well as assuming primary responsibility for new business generation in the DC Investments market on a national basis. Her client responsibilities include monitoring investment programs, evaluating and selecting investment managers and developing investment strategy, policies and objectives. She provides these services to both defined contribution and defined benefit plans for a variety of corporate and higher education plan sponsors. Liana has over 15 years of investment consulting experience, with a specialty in consulting to large defined contribution plan sponsors. She works with clients to support a strong governance framework for their Plan management program including a transition to a more streamlined, institutional investment model, with a focus on improving participant experience.

Liana is a member of our Target Date Fund Strategic Research Committee, our Discretionary DC Governance Committee and our National Defined Contribution Committee. Previously, she served on the manager research ratings review committee for nearly 10 years.

Prior to joining Mercer IC in 1998, Liana worked in the investment management industry as a marketing analyst at Quadra Capital Partners, and previously in operations at Boston Investor Services.

Liana has a B.A., cum laude, in economics from the University of New Hampshire. She is a CFA Charterholder and a member of the CFA Institute and the Boston Society of Security Analysts.





**Judy McKinney** | Executive Vice President & Manager  
**Callan Associates**

Judith H. McKinney is an Executive Vice President and the Manager of Callan's Institutional Consulting Group. She joined Callan in 1991. Judy is a member of the firm's Management Committee and is a shareholder of the firm. She helped create the Institutional Consulting Group's STAR, Market Intelligence and Boutique Performance Services. Judy consults with investment managers on product evaluation and analysis, strategic management issues and communications consulting.

Prior to joining Callan, Judy was a regional manager for CDA Investment Technologies' Performance Measurement Division, where she served asset managers, plan sponsors and consultants. She also held positions in trust business development with the Continental Illinois Bank and Trust Company and, early in her career, was a vice president and consultant to plan sponsors with A.G. Becker and a national accounts manager with Xerox Corporation.

Judy is located in Callan's Chicago office and consults to investment management firms throughout the United States. She earned a B.A. from Spring Hill College.



**Whitney Mishler, CFA** | Vice President, Portfolio Manager  
**The Permal Group**

Whitney Mishler is a Vice President and Portfolio Manager for The Permal Group. Mr. Mishler first joined Permal in 2010 as Financial Analyst, became Senior Financial Analyst in 2011 and came into his current role as Vice President and Portfolio Manager in June 2013. Before joining Permal in 2010, Mr. Mishler was Research Analyst at Rasini & Co. Limited and prior to that, Mr. Mishler was Analyst at Morgan Stanley & Co. LLC.

Mr. Mishler holds a Bachelor of Science, with dual concentration in Finance and Entrepreneurship & Emerging Enterprises, from the Syracuse University Martin J. Whitman School of Management, where he graduated cum laude in 2005. Mr. Mishler is a CFA®. Charterholder.



**Christopher Mulshine** | Managing Director, Head of U.S. Capital Services  
**Credit Suisse LLC**

Christopher H. Mulshine is a Managing Director of Credit Suisse in the Investment Banking division, based in New York. He is the Head of the U.S. Capital Services team, which works closely with departments across the Bank, in order to serve as a single center for capital sourcing, advisory, structuring and distribution services for hedge fund clients.

Mr. Mulshine joined Credit Suisse in 2008 from UBS Prime Services, where he served as the Deputy Head of North American Capital Introduction, based in New York. Prior to that, he was a Senior Research Analyst at Forester Capital, where he was actively involved in due diligence and new manager selection. From 2001 to 2003, Mr. Mulshine worked for Goldman Sachs in both Private Wealth Management and Prime Brokerage-Capital Introductions. From 1995 to 1999, Mr. Mulshine worked in Prime Brokerage services, in both New York and Hong Kong, for Goldman Sachs.

Mr. Mulshine holds a B.A. in Economics from Denison University, and an MBA in Finance from The Kellogg School of Management at Northwestern University.



**Christopher Newman, CFA** | Vice President, U.S. Institutional Sales  
**T. Rowe Price Associates, Inc.**

Chris Newman is a U.S. institutional sales executive for the Global Investment Services division of T. Rowe Price, the organization responsible for the firm's institutional business worldwide. He is a vice president of T. Rowe Price Group, Inc., and T. Rowe Price Associates, Inc.

Mr. Newman has 25 years of investment experience, all of which have been with T. Rowe Price. He has been with the firm since 1989. Prior to his current position, Mr. Newman was a regional sales director for T. Rowe Price Retirement Plan Services, the firm's defined contribution plan subsidiary.

Mr. Newman earned a B.A. in business/economics from McDaniel College and an MBA in finance from Loyola University Maryland. He also has earned the Chartered Financial Analyst designation and is a Series 6, 7, 63, and 65 registered representative.



**Anurag Pandit, CFA | Director of Investments  
Boston Children's Hospital**

Anurag Pandit joined the Boston Children's Hospital Investment Office in July 2010 as a senior member responsible for setting up a new investment office. He serves as a generalist to secure best in class investment managers in all investment and geographic areas on behalf of the Endowment and Pension Plan. Prior to Boston Children's Hospital, he was the founder and managing partner at Lexicon Management, a global long-short equity hedge fund for approximately four years. In the ten years prior to that he was a Senior Vice President and leader of the Small Cap Growth team at John Hancock Funds where he managed multi-cap, small cap and technology funds. At the time of Manulife's purchase of John Hancock, he also served as an interim co-chief equity officer. Anurag was a utilities and transportation sector equity analyst at Loomis Sayles and also spent four years in various roles in commercial banking at the Bank of Boston. He earned a Masters in Management from the Sloan School at MIT in 1988 and is a Chartered Finance Analyst.



**Carolyn Patton, CFA | Managing Director & Head of Consultant Relations,  
Americas | Deutsche Asset & Wealth Management**

Carolyn Patton, CFA, is Managing Director, Head of Consultant Relations, Americas at Deutsche Asset & Wealth Management. She joined the Company in 2014 with 22 years of industry experience. Prior to joining, Carolyn was Executive Managing Director, Principal leading the global distribution team at Turner Investments. Previously, she was Global Head of Consultant Relations at Janus Capital Group. Before, she was a Managing Director at Morgan Stanley Investment Management and worked at Delaware Investments. Carolyn started her career at SEI Investments. Carolyn received her B.A. in Economics from University of Virginia and is a CFA Charterholder.



**Chris Rae\*** | Managing Director, Head of Business Development  
**Sorin Capital Management, LLC**

Chris is a Managing Director and Head of Business Development at Sorin Capital Management, LLC, a Stamford, Connecticut-based investment management firm focused on CMBS and REITs and runs hedge fund, '40 Act liquid alternative, and value-add long-only strategies within these markets. Sorin currently manages over \$550mm in AUM from pension funds, family offices, and fund of funds.

From 2008 to 2013, Chris was a Director of Marketing at S.A.C. Capital Advisors, L.P. focused on covering all investor types across the Americas. Prior to joining S.A.C., from 2006 to 2008 Chris was a Managing Director, Client Relations at Chilton Investment Company. From 2003 to 2006, Chris was a Vice President at Goldman, Sachs & Co. working within the Equities and Fixed Income Divisions as a member of the Pensions Services Group providing institutional sales coverage for pensions, endowments, and foundations. Prior to 2003, Chris was an Associate in Goldman's Investment Banking Division primarily covering natural resources and industrial companies. Chris received both his AM and BA in Philosophy from Stanford University and his JD/MBA from Duke University. Chris is on the board of AIMSE (The Association of Investment Management Sales Executives) and currently serves as Treasurer.



**Michael Raso\*** | Senior Vice President, Director of Institutional Retirement & Subadvisory | **Old Mutual Asset Management**

Michael Raso is a Senior Vice President, Director of Institutional Retirement and Subadvisory at Old Mutual Asset Management. He is responsible for strategy and marketing within the retirement and subadvisory markets for the nine affiliates of Old Mutual. Prior to joining Old Mutual, Mr. Raso was a partner with Crosswind Investments, LLC where he was head of Marketing and Client Service. Previously he worked for Artisan Partners, where he was responsible for their defined contribution investment only business. Before that, he was a Senior Vice President with NATIXIS Asset Management where he oversaw the defined contribution and subadvisory business for all fourteen affiliated money management firms. Prior to NATIXIS, he spent twelve years with Fidelity Investments in various marketing and management roles. Mr. Raso holds a B.A. from Providence College. He is FINRA Series 10, 9, 7, 6 and 63 licensed. He resides in Hingham, Massachusetts with his wife and four daughters.

**John Regan | Chief Investment Officer | Permanens Capital**

John Regan is the Chief Investment Officer and operating partner of Permanens Capital. Established in 2011 with approximately \$300 million in assets from the two principals and a fully outsourced university endowment, Permanens currently manages over \$2.1 billion in assets providing portfolio management for endowments, foundations, and family offices.

Prior to founding Permanens, Mr. Regan was a Senior Investment Officer at Cornell University's Endowment, overseeing hedge funds, private equity, and overall endowment liquidity. He served as a member of the Executive Management Group in 2010 overseeing all Endowment investments and activities during the interim-CIO period. While at Cornell, he formulated and implemented a cross-asset class liquidity model for the management of illiquid assets. Mr. Regan previously founded Steeple Capital, a \$600 million equity hedge fund with offices in San Francisco and New York. Prior to Steeple, he was a Principal and portfolio manager at Andor Capital, a \$12 billion long/short equity hedge fund. Mr. Regan has also held direct investment positions with Bessent Capital, JP Morgan Fleming Asset Management, Train Smith Investment Counsel, and began his finance career at Morgan Stanley.

Mr. Regan serves on the Board of Advisors for Athletics at Tufts University, the Advisory Board and Investment Committee for The Salvation Army of Greater New York, and the Board of Trustees at Poly Prep Country Day School in Brooklyn, New York. He has chaired Poly Prep's Investment Committee since 2008 and the Development Committee since 2014.

Mr. Regan graduated cum laude from Tufts University in 1990 with a B.S. in Political Science and holds an MBA in Finance from NYU Stern School of Business. He also studied at the Yale in China Program at the Chinese University of Hong Kong.

**Chris Roy** | Director, Client Advisory Group | **Windrose Advisors**

Chris Roy is a Director in the Client Advisory Group at Windrose Advisors. Chris has worked in asset and wealth management for twenty years, helping families, institutional investors, and investment advisors achieve their investment and fiduciary objectives.

Chris has held executive roles with Fidelity Investments, Merrill Lynch, Schwab Center for Investment Research, and Harris myCFO in New York, San Francisco, and Boston. Chris' responsibilities have ranged from business development to investment research to trading to product and P/L management.

Chris began his career in 1994 with Acadian Asset Management, where he worked for two portfolio managers and helped some of the largest pension funds, endowments, and government entities around the world invest, primarily in global equities and currencies.

Chris is regularly invited to speak at investment conferences around the country and serves as a Trustee for the Dexter-Southfield School, where he sits on the Finance and Investment Committees. In addition to professional coursework at the Boston Security Analysts Society and UC Berkeley, Chris received an A.B. from Bowdoin College, where he was elected Captain of the lacrosse team. Chris coaches youth lacrosse in Lexington, MA, where he resides with his wife and children.

**Jeri Savage** | Managing Director, Defined Contribution Research  
**Rocaton Investment Advisors**

Jeri Savage, Managing Director, Defined Contribution Research, is responsible for target date fund, retirement income solutions, and other DC-related research coverage. Jeri has over 10 years of experience in research and analytical roles with investment and consulting firms. Jeri joined Rocaton from Evaluation Associates, where she spent several years as an Equity Research Associate and member of the firm's Defined Contribution Task Force. Jeri earned an M.B.A. with distinction in Finance and Marketing from New York University's Stern School of Business and graduated magna cum laude with a B.A. in Business Economics from Brown University.

# CONVERGENCE



**Leena Shah, CFA** | Principal | **Mercer**

Leena Shah is a Principal with Mercer's New York office. She is responsible for assisting clients with strategic asset allocation and portfolio structuring analysis; manager selection and ongoing performance evaluation. She has worked with a variety of clients including corporates, endowments, public funds and insurance companies.

Leena joined Mercer in April 2006 in the New York office and worked in Mercer's London office in 2012. She was previously employed with a leading private bank in India providing investing consulting services to high net worth individuals.

Leena holds an M.S. in Accounting from Baruch College, City University of NY and an MBA in marketing from Mumbai University in India. Leena is a CFA charter holder and a member of the CFA Institute and NYSSA.



**John Sileo, CSP** | Chief Executive Officer | **The Sileo Group**

John Sileo's identity was illegally used to embezzle \$300,000 from his clients. The exposure destroyed John's career and consumed two years of his life as he fought to stay out of jail. Combining real-world experience with years of study, John became an award-winning author, trusted advisor and leading speaker on technology, information and privacy protection.

John is the CEO of The Sileo Group, a privacy think tank that helps organizations protect the data that drives their profits. His body of work includes engagements with the Pentagon, USA Today, Blue Cross, the FDIC, Pfizer, 60 Minutes, Homeland Security, and organizations of all sizes.

John graduated from Harvard University and spends his free time snowshoeing the Rocky Mountains with his remarkable wife and two highly-spirited daughters.



## INSIGHT



**Chris Solarz** | Managing Director | **Cliffwater LLC**

Chris is a Managing Director of Cliffwater LLC and leads the Global Macro hedge fund due diligence research effort. Prior to joining Cliffwater in 2011, Chris was a Senior Analyst at SAIL Advisors, where he focused on manager selection and due diligence as Head of Research for tactical trading and relative value strategies. Previous experience includes working for ING Investment Management, Antarctica Asset Management, Societe Generale Barr Devlin, and CIBC World Markets. He earned a B.A. in Economics and Anthropology from the University of Pennsylvania and a MComm in Finance from the University of New South Wales, where he was a Federation Scholar. Chris is a Certified Public Accountant, holds the Chartered Alternative Investment Analyst® designation, the Chartered Financial Analyst® designation, and is a member of the New York Society of Security Analysts. Chris has broken 6 Guinness World Records, has run marathons on all 7 continents and in 49/50 states.



**Mark Sullivan** | Director, Institutional Sales & Relationship Management  
**Stralem & Company**

Mr. Sullivan joined Stralem in 2014 with extensive sales, relationship management, consultant relations and product development experience. Prior to joining Stralem, he was a Vice President with American Century Investments, where he led the relationship with Canadian Imperial Bank of Commerce, their largest outside investor. Previously, Mr. Sullivan spent 10 years at AllianceBernstein where he was a Managing Director in their Institutional and Sub-Advisory businesses. He began his career at Prudential Asset Management in 1984 and then took on increasingly senior roles in sales, relationship management and consultant relations at Bankers Trust, Nicholas-Applegate Capital Management and Chartwell Investment Partners.

Education: US Military Academy, West Point; B.S., Georgetown University.



**Miriam Tai, CFA, CAIA\*** | Global Head of Consultant Relations  
Itaú USA Asset Management Inc.

Miriam is currently the Global Head of Consultant Relations at Itaú Asset Management, \$160 billion Brazilian manager specializing in Latin American investments. Prior to Itaú, she was Head of US Consultant Relations at Man Investments, a \$50+ billion London-based hedge fund manager. Prior to that, she was Director of Consultant Relations at BlackRock. Before her asset management days, she spent time in structured finance as well as management consulting. Miriam has a MBA from the Haas School of Business, UC Berkeley, and an A.B. in Political Science from the University of Chicago. She holds both the CFA and CAIA designations. She's a native from Hong Kong, fluent in Cantonese and passable in French and Portuguese. Miriam spends her free time teaching Pilates, flying on the trapeze, and traveling in search of good food and good wine.



**Zornitza Taleva, CAIA** | Senior Consultant  
Hewitt EnnisKnupp, An Aon Company

As a senior consultant with Hewitt EnnisKnupp's alternative investment group, Zornitza is responsible for sourcing, conducting due diligence and monitoring hedge funds in global macro and risk parity strategies and is a member of the firm's Investment Committee. She is further involved in advising clients on direct hedge fund investments and is a member of the firm's investment committee for global macro and risk parity.

Prior to Hewitt EnnisKnupp, Zornitza was a Senior Research Analyst with Pioneer Alternative Investments, a large European fund-of-hedge funds affiliated with Italy's UniCredit Group, where she covered credit and event driven strategies. Before Pioneer, Zornitza was with GreenLake Capital, where she was responsible for performing due diligence on US-based single-strategy arbitrage and L/S equity sector specialist hedge fund managers for Swiss private bank Bordier & Cie.

Zornitza has a B.S./ MBA degree in Finance and Financial Instruments and Markets from NYU Stern School of Business and further holds the Chartered Alternative Investment Analyst (CAIA) designation. Zornitza joined Aon Hewitt in April of 2011 and is based in New York.

# PERSPECTIVE



**Christopher Thompson, CFA** | Senior Investment Consultant  
**Towers Watson**

Chris joined Towers Watson in September 2013 and is currently head of the firm's U.S. equity manager research team.

Chris has over 20 years of investment experience, including over 15 years conducting investment manager due diligence. Prior to joining Towers Watson, Chris was the head of global equity manager research at Segal Rogerscasey, a diversified investment consulting firm.

Mr. Thompson graduated with a B.A. in Economics from Siena College. He holds the Chartered Financial Analyst (CFA) designation and is a member of the CFA Institute and the New York Society of Security Analysts.



**Pete Whitlock, MBA, CIMA\*** | Partner | **Century Capital Management**

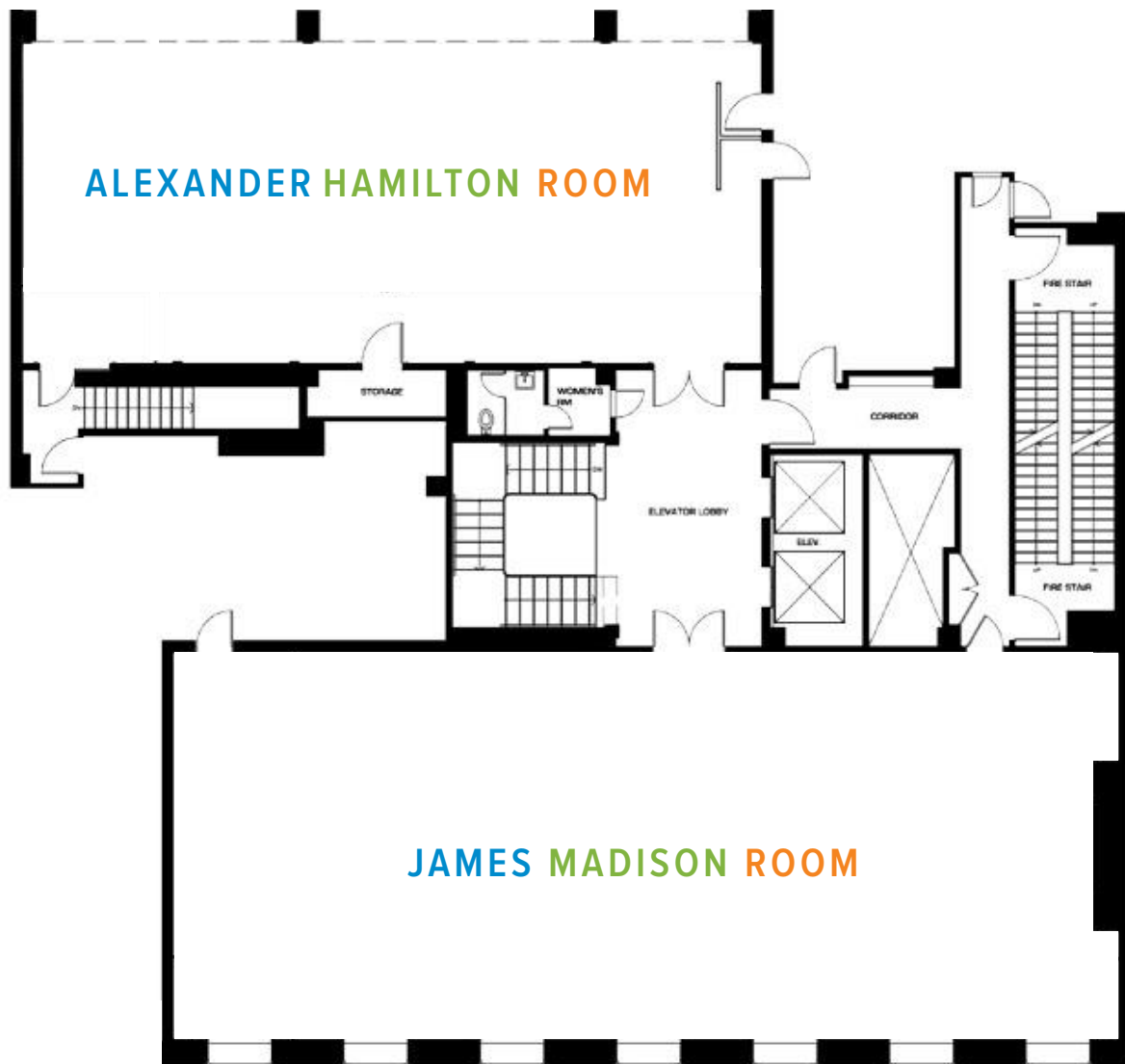
Pete Whitlock is responsible for institutional sales and client service for separate accounts and mutual funds. Prior to joining Century in 2006, he was vice president of separately managed accounts in the Northeast for AllianceBernstein Investment Research and Management. Previously, Pete was an equity trader with Fidelity Management & Research and a marketing representative with Fidelity Investments Institutional Services. Before joining Fidelity he was a marketing and client service representative with Eaton Vance. He has more than 18 years of investment industry experience. Pete earned a Bachelor's degree from Lake Forest College and an MBA from Boston University's Graduate School of Management. He is a Certified Investment Management Analyst® professional. Pete holds his FINRA Series 24, 7 and 63 licenses.



**Matthew Yannocone\*** | Director, Institutional Sales  
**WisdomTree Asset Management, Inc.**

Matt is Director of Institutional Sales at WisdomTree Asset Management, an Index Developer & ETP Sponsor. Matt dedicates his time to working with plan sponsors, endowments and foundations along with those that invest and consult on their behalf. Prior to joining WisdomTree, Matt worked as part of AXA Equitable's business development team. Matt received his Political Science & Communications degrees from Syracuse University and his MBA from the Lubin School of Business at Pace University.

## Floor Plan Second Floor





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