AIMSE 2011 Fall Conference Agenda
The Princeton Club | New York, New York
October 6, 2011
Final Program

7:15 – 5:30 pm **Registration**

7:15 – 8:15 am **Breakfast**

8:15 – 8:30 am **Welcome and Introduction of Exhibitors and Sponsors**

8:30 – 9:30 am **Consultant Consolidators in the Industry**

Recent mergers within the investment consultant community have dramatically changed the advisory landscape. This panel will focus on consolidation within the consultant channel, and its impact on investment managers. Will there be further consolidation or changes for these firms? Please join us for a discussion on how these consultants have handled the integration and how their research platforms have evolved.

Moderator:
- Kerry Dempsey, Lasair Capital, LLC

Speakers:
- Christopher DeMeo, Head of Investment, North America, Towers Watson Investment Services, Inc.
- Jeff Schutes, Senior Partner, US Institutional Consulting Leader, Mercer
- Elliott Wislar, CEO, Clearbrook

9:30 – 10:15 am **Social Media: Tweets, Likes and Friends in the Institutional Market?**

Social media is taking on a dominant role in our daily communications and is a key marketing tool for all things retail—from Abercrombie to Zumiez. In keeping, the retail investment community has jumped on board, but how does the institutional asset manager deal with the unique challenges of these new media?

Moderator:
- Marlene Petter, VP Marketing & Communications, Delaware Investments

Speakers:
- Tom Walek, Walek & Associates
- Mark Salameh, Partner, Head of Sales & Marketing, HedgeWave

10:15 – 10:45 am **Refreshment break with Our Exhibitors**

10:45 – 11:45 am **Public Pension Plan Panel – A Review of the Underfunded Crisis and how various plans are Responding –**

In an underfunded world, how are public pensions dealing with the myriad pressures placed on their funds by politicians, taxpayers, unions and the keepers of the purse strings? Will major structural shifts spell the end of the public defined benefit market, and what will the impact be on all stakeholders?

Moderator:
- Donald Curran, Senior Vice President, Phoenix Investment Adviser LLC

Speaker:
- Cheryl Alston, Executive Director, Employees Retirement Fund of the City of Dallas
- John Driscoll, Ex-Director and Trustee, New York City Police Retirement Fund

11:45-12:30 pm **Managing the conflict between Manufacturing and Distribution in your organization**

Success in the asset management world depends on the two big engines-Manufacturing and Distribution—working well together. Highly acclaimed authors and consultants, Jim Ware and Keith Robinson, will discuss their recent paper, "Investment Tribes" which defines the cultural differences between investing and marketing and describes the friction points that exist between them. They will review best practices from the top firms and share practical tools to implement in your own organization. Don't miss this highly interactive and entertaining session!

Speakers:

Jim Ware, CFA, Principal, and Keith Robinson, Managing Director, Focus Consulting Group, Inc.

12:30 – 1:45pm **Networking Lunch**

1:00 – 1:45 pm **Coffee and dessert, Trends in search activity –**

Which asset classes are hot, and more importantly – what is next on the horizon? Where are the greatest opportunities for investment managers to raise assets? Kelly will review 2011 and provide some insight into the way forward, including Callan's capital market projections for clients' asset allocation modeling.

Speaker:

Kelly Cliff, Chief Investment Officer of Public Markets, Callan Associates

2:00 – 3:00 pm **Plan Sponsor Panels**

What is keeping investors up at night? What issues are taking up their time? What are some of the challenges they face where the investment management community can assist them? We will take a look at these issues across a variety of investor types and uncover their appetite for risk, future investment strategies and implementation.

Moderator:

Mark S. Clewett, Managing Partner – Client Services, Conestoga Capital Advisors LLC

Speakers:

Steve Senft, Vice President, Capital Markets, Ethika Investments (MFO)
Chris Vella, CFA, Global Director of Manager Research, Northern Trust
Leonard Lovallo, Director Corporate Funds, Time Warner
Jeff Nipp, CFA, Managing Director, BlackRock

3:00 – 3:30 pm **Networking Break**

3:30 – 4:15 pm **Career Coach**

Join Ray to learn about how to navigate professionally within your organization, understand corporate politics, sharpen communication skills, follow proper business etiquette and other skills to climb the corporate ladder. He will also provide tips on stress management and work/life balance so we can all work efficiently and effectively.

Speaker:

Ray Sclafani, PCC, ClientWise.com

4:15 – 5:30 pm **Consultant Panel**

The Consultant Relations Catch 22: If we have clients in common we can meet…..If I could get a meeting we'd have clients in common!

In today's dynamic markets investment managers and consultant are both working to help clients meet complex investment needs. How do we find the balance between our need for access to key Field Consultants and Research people with their overloaded schedules? A panel of experts will provide guidance on: How to determine who you should be meeting with; How to get the meeting; How best to add value and use the time wisely; and How to stay on the radar after the meeting. Panelists will also discuss client trends and search activity, and we will have a lively Q&A!

Moderator:
Rhoni Wiswall, Head of Consultant Relations, Crestline Investors
Speaker:
Jim Neill, Managing Director, Wilshire Associates
Soonyong Park, Managing Director, Head of Global Portfolio Solutions, RogersCasey
Keith Berlin, Vice President, Fixed Income Research, Fund Evaluation Group
Paul Erlendson, Callan Associates

5:30 pm **Cocktail Reception,**

- Mentee Group Meeting with the AIMSE President, Tony Wilkins