

AGENDA DAY ONE: TUESDAY, MAY 14, 2019

8:00 AM – 8:45 AM	REGISTRATION & CONTINENTAL BREAKFAST WITH THE EXHIBITORS
8:45 AM – 9:00 AM	WELCOME Presentation for Outstanding Women in Performance & Risk Measurement Awards <i>David Spaulding, DPS, CIPM, The Spaulding Group, Inc.</i>
9:00 AM – 9:50 AM	FINDING AND RETAINING QUALITY PERFORMANCE AND RISK TALENT <i>Frances Barney, CFA, BNY Mellon</i>
9:55 AM – 10:40 AM	WHY YOUR CAREER PATH IN PERFORMANCE MATTERS AND WHAT YOU CAN DO TO MAKE SURE YOU ARE ON THE RIGHT PATH <i>Alex Shafran, CFA, Cohen & Steers; Susan Agbeneto, CIPM, Opus Investments; Melissa Ahern, State Street; Ashley Reeves, CIPM, The Spaulding Group</i>
10:40 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	TAPPING THE POWER OF DATA VISUALIZATION TO SIMPLIFY YOUR ANALYTICS STORY <i>Jeff Foley, Wilshire Associates</i>
12:00 PM – 1:00 PM	LUNCH
1:00 PM – 1:55 PM	THE ROLE OF TRADING IN PORTFOLIO PERFORMANCE ATTRIBUTION (2018 DIETZ AWARD WINNING PAPER) <i>Henri Waelbroeck and Carla Gomes, Portware</i>
2:00 PM – 2:50 PM	MONEY, HAPPINESS, AND THE FUTURE OF WEALTH MANAGEMENT <i>Brian Portnoy, Ph.D., CFA</i>
2:50 PM – 3:15 PM	AFTERNOON BREAK
3:15 PM – 3:45 PM	WRESTLING WITH THE DATA TO MAKE IT WORK FOR YOU <i>Jennifer Barnette, CIPM, The Spaulding Group – moderator; Mike Pfaff, CIPM, Vanguard; Laurie Hesketh, CIPM, Meradia Group; Jonnathan De Jesus, Members Trust</i>
3:50 PM – 4:35 PM	EVOLVING PERFORMANCE ATTRIBUTION <i>Michael Canty, CFA, Capital Group</i>
4:40 PM – 5:00 PM	PERFORMANCE JEOPARDY <i>Alex Spaulding, CIPM, The Spaulding Group</i>
5:00 PM – 6:00 PM	COCKTAIL HOUR WITH THE EXHIBITORS



AGENDA DAY TWO: WEDNESDAY, MAY 15, 2019

8:00 AM – 8:40 AM	CONTINENTAL BREAKFAST WITH THE EXHIBITORS
8:40 AM – 8:50 AM	WELCOME BACK/RECAP Performance and Risk Measurement Hall of Fame Awards presentation <i>David Spaulding, DPS, CIPM, The Spaulding Group</i>
8:50 AM – 9:00 AM	FRED ALGER AND THE ORIGIN OF THE GIPS STANDARDS <i>James Hollis</i>
9:00 AM – 9:50 AM	ENVIRONMENTAL, SOCIAL, GOVERNANCE (ESG) AND ITS IMPACT ON PERFORMANCE <i>Dax Johnson, CFA, State Street; Christopher Berry, State Street</i>
9:55 AM – 10:40 AM	REGULATORY ASPECTS OF PERFORMANCE ADVERTISING <i>John O'Brien, Esq.; Steven Stone, Esq.</i>
10:40 AM – 11:00 AM	MORNING BREAK
11:00 AM – 11:55 AM	HOW WE DO THINGS WITH WORDS: RHETORIC AND PERSUASION IN THE 'REALITY' ERA <i>Michael Drout, Ph.D.</i>
12:00 PM – 12:50 PM	LUNCH
12:50 PM – 1:20 PM	WHAT DO ASSET OWNERS REALLY WANT? <i>Arun Kumar, CFA, CIPM, Charles River Development; Tom White, BmGI</i> <i>Arun Muralidhar, Ph.D., M-cubed Technologies; Bob Harrison, GM Asset Management</i>
1:25 PM – 1:55 PM	NET OF FEE PERFORMANCE CALCULATIONS <i>Krista Harvey, CFA, CIPM, TIAA</i>
2:00 PM – 2:30 PM	ON THE HOT SEAT: FIRE QUESTIONS AT OUR PANEL OF EXPERTS <i>John D. Simpson, CIPM The Spaulding Group; Mark Goodey, DiP IoD, Eagle Investment Systems; Elske van de Burgt, Ortec Finance; Michael Stevens, CIPM, Prudential Financial</i>
2:30 PM – 3:10 PM	GIPS 2020 <i>David Spaulding, DPS, CIPM</i>
3:10 PM – 3:30 PM	AFTERNOON BREAK
3:30 PM – 4:20 PM	RETHINKING BENCHMARK CRITERIA: WHY WE'VE GOTTEN IT WRONG AND WHAT REALLY MATTERS <i>Dave Spaulding, DPS, CIPM, The Spaulding Group</i>
4:20 PM – 4:30 PM	CONFERENCE CONCLUDES – RAFFLE PRIZES

