**Carl R. Bacon, CIPM**, is Chief Advisor to Confluence. He is a member of the Advisory Board of the Journal of Performance Measurement and Founder of The Freedom Index Company. He was formerly Chairman of StatPro Plc from 2000 to 2017. Prior to joining StatPro Carl was Director of Risk Control and Performance at Foreign & Colonial Management Ltd, Vice President Head of Performance (Europe) for J P Investment Management inc. and Head of Performance for Royal Insurance Asset Management. Carl hold a B.Sc.(Hons) in Mathematics from Manchester University and is a member of the Advisory Board of the Journal of Performance Measurement. A founder member of both the Investment Performance Council and GIPS, Carl is a member of the GIPS Executive Committee and ex-chair of both the Verification and Interpretations sub-committees and founder of the Freedom Index Company. Carl is the author of Practical Portfolio Performance Measurement & Attribution (Book of the year 2004 [www.riskbook.com](http://www.riskbook.com)), Practical Risk-adjusted Performance Measurement, numerous articles and papers and editor of Advanced Portfolio Attribution Analysis.

**Steve O'Brien, EVP,** Global Head of Sales Engineering, RIMES Technologies

Steve joined RIMES in 2000 and now leads a global team sales engineers who offer implementation expertise and best practice knowledge across the complete range of RIMES Managed Data Services and RegTech Solutions. He has 25 years of experience in the data management industry, including time spent as an account consultant at Thomson Financial – Datastream. Steve holds a BSc (hons) in Mathematics, Operational Research and Economics from the University of Essex. As well as having a love for benchmarks and data management, Steve's other passion is Fulham football club, otherwise known as soccer for the US audience.

**David D. Spaulding, DPS, CIPM** has been a thought leader in our industry for more than 30 years, and has an in-depth experience with every major asset class and just about any circumstance. He is arguably the #1 authority on performance measurement. Dave has over 40 years’ experience in management and technology, including over 30 years in the financial sector. He has conducted training classes for our clients, the CFA Institute, as well as local societies for 25 years. He has written four books, and been co-author and/or editor of five more. He has also written numerous articles for various industry publications. Dave has served on a variety of industry committees and working groups. He earned a BA in Mathematics from Temple University, an MS in Systems Management from the University of Southern California an MBA in Finance from the University of Baltimore, and a doctorate in Finance and International Economics from Pace University.

**Ian Thompson** has been closely involved in the development of Performance Measurement and Analytics as a unique discipline within Investment Management over the last 25+ years. Heading the product management function in several performance vendor firms, he has built some of the leading performance and portfolio analytics solutions. Prior to joining BNY Mellon’s Data and Platform as Head of Performance Product Management in May 2022 Ian had previously set up ‘Performance and Analytics Consultants Ltd’ as a specialist portfolio analytics consultancy in order to provide insights to Asset Managers, Consultants and Vendors. At StatPro plc, Ian was latterly Global Director of Portfolio Analytics from September 2016 – March 2020. He re-defined StatPro’s **Revolution** Portfolio Analytics product strategy to help re-establish Statpro’s position as a leading global portfolio analytics vendor. From September 2014 – September 2016, as Product Management Director for Performance, he led the product strategy, product management and launch in 2016 of the award-winning cloud-based **Revolution** Performance. At Bi-Sam, Ian held various posts from October 2007 to June 2014 including Executive Regional Director APAC, Director of Product Management and Account Management Director. Before joining Bi-Sam Ian was Director of Business Development for Microgen plc. He was also a Board Director of Strategic Asset Management Solutions Ltd. (SAMS), where he developed the ***Socrates*** Performance Analysis suite of products, which was the first transaction-based security level attribution product in the market, and one of the first fixed income attribution solutions.