**Michael Margulis** manages the broker-dealer performance reporting team at Ameriprise Financial, responsible for maintaining the infrastructure to support presentation of investment performance to approximately 10,000 financial advisors and millions of mostly retail clients.  Prior to moving from California to Minnesota and joining Ameriprise in 2015, Michael was at LP Capital Advisors, a boutique private equity consulting firm, for nearly 11 years where he assisted institutional investors with sourcing, evaluating, and monitoring their private equity investments.  He began his career at Vestek, a fintech company, and gained investment reporting experience at Laurel Management Company and securities lending experience at Barclays Global Investors.  Michael holds an undergraduate degree in mathematics/economics from the University of California, Santa Barbara and MBA from the University of California, Davis.  He also holds Series 7 and 24 FINRA licenses.

**John D. Simpson** John has been with The Spaulding Group since 2005, where he regularly conducts GIPS and non-GIPS verifications, as well as GIPS examinations. He also teaches classes on performance measurement, attribution, risk, and GIPS, and conducts software searches, operations, and technology related consulting assignments. John is a regular speaker at industry conferences and society programs. He is the co-author of The Spaulding Group’s Guide to the Performance Presentation Standards (TSG Publishing, 2012) and has written numerous articles. John crafted and conducted The Spaulding Group’s CIPM prep courses (no longer offered). John is currently a member of the United States Investment Performance Committee’s After-Tax Working Group, working on recommendations for firms that present after-tax performance results.

Prior to joining The Spaulding Group, John spent 20 years with Integrated Decision Systems, a New York-based software vendor that provided portfolio accounting and performance measurement solutions to the investment industry. He was the Product Manager for their GIM Performance and CALiPER investment performance & analytics systems. John was responsible for the enhancement “road maps” for the performance systems with the primary responsibility of aligning the product’s goals with customer needs and market demands. He also acted as chief business analyst in specifying performance analytics and portfolio accounting functionality John holds a BS in Applied Mathematics from UCLA, where he was a member of their 1987 NCAA national championship volleyball team.

**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.