

Full RFP Symposium Schedule

7:15 am – 8:00 am

Registration and Full Breakfast

8:00 am - 8:15 am

Welcome by Conference Co-chairs & introductions from Sponsors/Exhibitors

Conference co-chairs:

Jamie Lee – Director of Institutional Communications at Harbor Funds Distributors

Diane Hallett - RFP Manager at Eaton Vance Management

8:15 am – 9:15 am

General Session

Consultant's Perspective: How the RFP Process Has Changed, Trends, and Best Practices

Speakers:

John Hartman - Managing Director at Rocaton Investment Advisors

Nancy Tanguay - Analyst and RFP Writer at Segal Rogerscasey

TBD

9:15 am – 10:15 am

Concurrent Breakout Sessions

1. Customized Executive Summaries (and Proposals) in a Snap

Speaker:

Ellen Jones – Manager, Segment Marketing at TIAA

2. Project Management 101 - Nuts and Bolts of managing the RFP process

Speaker:

Anne Farro - Head of Business Management, North America Institutional at Allianz Global Investors

3. Core Content Management – the Essentials

Speakers:

Sydney Blackett - Firm Language Specialist at Invesco

Ailin Wang - CMS Associate at Lazard Asset Management

Erin O'Brien - Investment Reporting Manager at Wellington Management Company

10:15 am - 10:45 am

Networking Break & Visit with Exhibitors

10:45 am – 11:45 am

Concurrent Breakout Sessions

1. Blueprint for Success: Building a Best-in-Class RFP Team

Speaker:

Colleen Dunne – Head of RFP at Voya Investment Management

2. Qualifying RFPs

Speaker:

Maggie Mair – Manager, RFP at Invesco

3. Understand the Sales Process

Speakers:

Craig Peterson – Institutional Distribution at Guggenheim Investments

Becky Bowler – Managing Director – Strategic Partnership Group at Guggenheim Investments

Mike Siciliano – Head of Sales and Business Development, North America at Baring Asset Management

11:45 am – 1:00 pm

Lunch & Visit with Exhibitors

1:00 pm – 2:00 pm

General Session

Lifecycle of an RFP: Perspectives from Everyone Who Touches an RFP and Q&A with the panel

Speakers:

Kristen Fenik – Director, Consultant Relations & Client Service at Arrowpoint Partners

Colleen Dunne – Head of RFP at Voya Investment Management

Cathryn Kaehr – Vice President, Marketing Communications at Jennison Associates

Corinne Ratliff – Compliance Officer at Brown Advisory

2:00 pm – 3:00 pm

Concurrent Breakout Sessions

1. Outsourcing

Speakers:

Lisa Williams – Head of RFP Management (North America) at Allianz Global Investors

Cathy McLagan – Head of RFP & Consultant Databases at Invesco

2. Career Development – life after the RFP team

Speakers:

Diane Hallett - RFP Manager at Eaton Vance Management

Stephanie Lamb –Consultant Database Manager at Jennison Associates

Michi McDonough – Managing Director – Consultant Relations at Parametric

Dorothy Friedrich – RFP Manager at AXA Investment Managers

3. Core Content Management – the Essentials

Speakers:

Sydney Blackett - Firm Language Specialist at Invesco

Ailin Wang - CMS Associate at Lazard Asset Management

Erin O'Brien - Investment Reporting Manager at Wellington Management Company

3:00 pm - 3:30 pm

Networking Break & Visit with Exhibitors

3:30 pm – 4:15 pm

General Session

Secrets of a Winning RFP

Speaker:

Amanda Tepper - Founder and CEO at Chestnut Advisory Group

4:15 pm – 5:00 pm

General Session

Market Trends and Projections

Speaker:

Mike Evans - President at FUSE Research Network

5:00 pm – 5:15 pm

Closing Remarks

5:15 pm – 6:15 pm

Informal Reception/Networking

Location: Westin Lobby Bar