

## Full RFP Symposium Schedule

<b>7:15 am – 8:00 am</b>	<b>Registration and Full Breakfast</b>
<b>8:00 am - 8:15 am</b>	<b>Welcome by Conference Co-chairs &amp; introductions from Sponsors/Exhibitors</b>
	<i>Conference co-chairs:</i>
	<i>Jamie Lee – Director of Institutional Communications at Harbor Funds Distributors</i>
	<i>Diane Hallett - RFP Manager at Eaton Vance Management</i>
<b>8:15 am – 9:15 am</b>	<b>General Session</b>
	<b><i>Consultant's Perspective: How the RFP Process Has Changed, Trends, and Best Practices</i></b>
	<i>Speakers:</i>
	<i>John Hartman - Managing Director at Rocaton Investment Advisors</i>
	<i>Nancy Tanguay - Analyst and RFP Writer at Segal Rogerscasey</i>
	<i>TBD</i>
<b>9:15 am – 10:15 am</b>	<b>Concurrent Breakout Sessions</b>
	<b>1. <i>Customized Executive Summaries (and Proposals) in a Snap</i></b>
	<i>Speaker:</i>
	<i>Ellen Jones – Manager, Segment Marketing at TIAA</i>
	<b>2. <i>Project Management 101 - Nuts and Bolts of managing the RFP process</i></b>
	<i>Speaker:</i>
	<i>Anne Farro - Head of Business Management, North America Institutional at Allianz Global Investors</i>

**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*

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**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*