

2015 RFP Symposium

Navigating the New Global Environment



Agenda

7:30 am – 8:15 am	Registration
8:15 am – 8:30 am Madison Ballroom	Welcome & Introductions from Sponsors & Exhibitors Sydney Blackett and Maggie Mair , <i>Conference Co-Chairs</i>
8:30 am – 10:00 am	General Session
Madison Ballroom	Consultant's Perspective: How the RFP Process has Changed and Where It's Going William Dahab , <i>Dahab Associates</i> , and Jeffrey Snyder , <i>Cammack Retirement Group</i>
10:30 am – 11:30 am	Concurrent Breakout Sessions
Graybar Boardroom	Creating Your Itinerary – Project Management 101 <i>Traditional Firms</i> Lisa Williams , <i>Allianz</i>
Chrysler Boardroom	Creating Your Itinerary – Project Management 101 <i>Non-traditional set-ups, smaller firms, remote teams, and more.</i> Jamie Lee , <i>Harbor Funds</i>
Empire Boardroom	Qualify It – Before Traveling Down the Path of Completing the RFP, it's Important to Ask: Do we Even Qualify? Is it Worth it? Maggie Mair , <i>Invesco</i>
Presidential Suite (40th Floor, Room 4012)	SEC Scrutiny/Compliance & Legal Regulations — Why the Compliance Review is Important, and what the Compliance Teams are Looking for Georgia Cochrane , <i>Invesco</i>



Agenda

11:30 am – 12:30 pm	Concurrent Breakout Sessions (Choose One)
Graybar Boardroom	<p>Taking the Maiden Voyage <i>Directed Towards Writers — Very NEW to the Industry</i> Sydney Blackett, Invesco</p> <p>The learning curve can feel very steep when just entering the industry. This session will cover useful resources to learn more about the industry (<i>useful websites/reading list, organizations</i>) as well as tips/tricks to navigating the new environment (<i>building good relationships with SMEs, asking questions when unsure about topics, etc.</i>)</p>
Chrysler Boardroom	<p>Core Content Management — the RFP Database Contains a Wealth of Information Annie Kang, Guggenheim Investments</p> <p>A session on how to ensure the content is current and accurate, and encouraging active engagement of SMEs to provide answers to new questions.</p>
Empire Boardroom	<p>Blurred Lines — When do RFP/DB Responsibilities End and Client Servicing Begin? <i>Intended for Managers</i> Cathy McLagan, Invesco and Linsey Owens, Jensen</p>
12:30 pm – 1:30 pm	Lunch & Visit with Exhibitors

1:30 pm – 2:30 pm	General Session
Madison Ballroom	<p>Presentation and Discussion on the 2015 RFP Survey</p> <p>Craig Peterson, <i>Guggenheim Investments</i> Peter Smith, <i>Franklin Templeton</i> Jan Deroost, <i>Invesco</i> Bruno Guy-Wasier, <i>AXA Investment Management</i></p>
2:30 pm – 3:30 pm	Concurrent Breakout Sessions (Choose One)
Presidential Suite (40th Floor, Room 4012)	<p>Building and Keeping your Team <i>Intended for Managers</i></p> <p>Bruno Guy-Wasier, <i>AXA Investment Management</i></p> <p>A discussion on the challenges of recruiting talented writers, and limiting turnover on your team.</p>
Graybar Boardroom	<p>Oh, the Places You'll Go – Career Development and Pathing after Leaving the World of RFP</p> <p>Kari Brett, <i>Principal Global Investors</i></p>
Empire Boardroom	<p>Navigating Database Landscape</p> <p>Luz Rodriguez and Sandra Canela-Noble, <i>Lazard</i></p> <p>A discussion covering all sides of the databases — manual vs. automated, managing database timelines, and the differences between the many databases out there.</p>
3:30 pm – 4:00 pm	Break & Visit with Exhibitors
4:00 pm – 5:00 pm	General Session
Madison Ballroom	<p>Navigating the Global Investment Community</p> <p>Rachel S. L. Minard, <i>Founder and CEO of Minard Capital, LLC</i> <i>A Premier Asset Raising Consultant for the Global Alternative Investment Industry</i></p>
5:00 pm – 5:15 pm	Closing Remarks
5:15 pm – 6:30 pm	Reception