

**AGENDA DAY ONE: WEDNESDAY, MAY 24, 2023**

<b>8:00 AM – 8:45 AM</b>	<b>REGISTRATION &amp; CONTINENTAL BREAKFAST WITH EXHIBITORS</b>
<b>8:45 AM – 9:00 AM</b>	<b>WELCOME</b> David Spaulding, DPS, CIPM, TSG
<b>9:00 AM – 9:50 AM</b>	<b>TALENT RECRUITMENT &amp; RETENTION</b> Alex Shafran, Cohen & Steers; Diane Robertson, T. Rowe Price; Frances Barney, CFA, BNY Mellon
<b>9:55 AM – 10:40 AM</b>	<b>DATA QUALITY WORKING GROUP: REPORT OF FINDINGS</b> Claude Giguere, Robust Technologies; Michael Margulis, Ameriprise; Tricia Bailey, CIPM, T. Rowe Price
<b>10:40 AM – 11:10 AM</b>	<b>MORNING BREAK</b>
<b>11:10 AM – 12:00 PM</b>	<b>ENVIRONMENTAL, SOCIAL, GOVERNANCE (ESG) AND ITS IMPACT ON PERFORMANCE</b> Jennifer Barnette, CIPM, TSG; Susan Agbenoto, CIPM, Opus Investment Management; Shankar Venkatraman, CFA, FRM, American Century; Mike Beck, CIPM, CFP, CAIA, Glenmede
<b>12:00 PM – 1:00 PM</b>	<b>LUNCH</b>
<b>1:00 PM – 1:55 PM</b>	<b>PRIVATE REAL ESTATE PERFORMANCE AND BENCHMARKING</b> NCREIF
<b>2:00 PM – 2:50 PM</b>	<b>PERFORMANCE REPORTING: BEYOND GIPS<sup>®</sup></b> Alicia Spencer, CIPM, Meradia Group; Sean Gilligan, CFA, CPA, CIPM, Longs Peak Advisory Services; Christine Iannacone, CIPM, Prudential
<b>2:50 PM – 3:15 PM</b>	<b>AFTERNOON BREAK</b>
<b>3:15 PM – 3:55 PM</b>	<b>2022 DIETZ AWARD WINNING ARTICLE: PRACTICAL GUIDELINES FOR FUNDING/SOLVENCY RATIO</b> Bradley Vincent-Barnes, Ortec Finance
<b>3:55 PM – 4:35 PM</b>	<b>THE RISE OF DIRECT INDEXING AND HOW IT RELATES TO PERFORMANCE</b> Jeff Clough, Natixis
<b>4:35 PM – 5:00 PM</b>	<b>PERFORMANCE JEOPARDY</b> David Spaulding, DPS, CIPM, TSG
<b>5:00 PM – 6:00 PM</b>	<b>COCKTAIL HOUR WITH THE EXHIBITORS</b>



**Twenty-first Annual  
International Performance Measurement, Attribution & Risk Conference (PMAR™)**

**AGENDA DAY TWO: THURSDAY, MAY 25, 2023**

<b>8:00 AM – 9:00 AM</b>	<b>CONTINENTAL BREAKFAST WITH EXHIBITORS</b>
<b>9:00 AM – 9:10 AM</b>	<b>WELCOME BACK</b> David Spaulding, DPS, CIPM, TSG
<b>9:10 AM – 10:00 AM</b>	<b>LONG/SHORT PORTFOLIOS: RETURNS AND ATTRIBUTION</b> John D. Simpson, CIPM, TSG
<b>10:00 AM – 10:50 AM</b>	<b>EVALUATING BENCHMARK MISFIT RISK</b> Stephen Campisi, CFA, The Pensar Group
<b>10:50 AM – 11:10 AM</b>	<b>MORNING BREAK</b>
<b>11:10 AM – 12:00 PM</b>	<b>PERFORMANCE EVALUATION AND RISK WHEN RETURNS AREN'T NORMALLY DISTRIBUTED</b> Dan diBartolomeo, Northfield Information Services
<b>12:00 PM – 1:00 PM</b>	<b>LUNCH</b>
<b>1:00 PM – 1:45PM</b>	<b>DATA VISUALIZATION</b> Carla Saliba, CEO & Founder, Infographic.ly
<b>1:45 PM – 2:40 PM</b>	<b>NEW SEC GUIDELINES: EXTRACTED PERFORMANCE AND ATTRIBUTION</b> Steve W. Stone, Morgan, Lewis & Bockius; Thayne Gould, Vigilant
<b>2:40 PM – 3:10 PM</b>	<b>AFTERNOON BREAK</b>
<b>3:10 PM – 4:00 PM</b>	<b>WHAT PERFORMANCE PROFESSIONALS DON'T KNOW ABOUT PERFORMANCE (BUT SHOULD)</b> David D. Spaulding, DPS, CIPM, TSG
<b>4:00 PM – 5:00 PM</b>	<b>CONFERENCE ENDS – RAFFLE PRIZES</b>

