

AGENDA DAY ONE: WEDNESDAY, MAY 24, 2023

8:00 AM – 8:45 AM	REGISTRATION & CONTINENTAL BREAKFAST WITH EXHIBITORS
8:45 AM – 9:00 AM	WELCOME David Spaulding, DPS, CIPM, TSG
9:00 AM – 9:50 AM	TALENT RECRUITMENT & RETENTION Alex Shafran, CFA, Cohen & Steers; Diane Robertson, T. Rowe Price; Frances Barney, CFA, BNY Mellon, Moderator - Patrick W. Fowler, TSG
9:55 AM – 10:40 AM	DATA QUALITY WORKING GROUP: REPORT OF FINDINGS Claude Giguere, Robust Technologies; Michael Margulis, Ameriprise; Tricia Bailey, CIPM, T. Rowe Price Moderator - Kathleen Seagle, CIPM, TSG
10:40 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	ENVIRONMENTAL, SOCIAL, GOVERNANCE (ESG) AND ITS IMPACT ON PERFORMANCE Jennifer Barnette, CIPM, TSG; Susan Agbenoto, CIPM, Opus Investment Management; Shankar Venkatraman, CFA, FRM, American Century; Mike Beck, CIPM, CFP, CAIA, Glenmede;
12:00 PM – 1:00 PM	LUNCH
1:00 PM – 2:00 PM	PRIVATE REAL ESTATE PERFORMANCE AND BENCHMARKING Jamie Kingsley, NCREIF; Maritza Matlosz, MetLife
2:00 PM – 2:50 PM	AI: IT'S HERE – HOW DO WE MAXIMIZE THE POTENTIAL OF THIS NEW TECHNOLOGY? Harald Collet, Alkymi
2:50 PM – 3:15 PM	AFTERNOON BREAK
3:15 PM – 3:55 PM	2022 DIETZ AWARD WINNING ARTICLE: PRACTICAL GUIDELINES FOR FUNDING/SOLVENCY RATIO Bradley Vincent-Barnes, Ortec Finance
3:55 PM – 4:35 PM	THE RISE OF DIRECT INDEXING AND HOW IT RELATES TO PERFORMANCE Jeff Clough, Natixis
4:35 PM – 5:00 PM	PERFORMANCE JEOPARDY David Spaulding, DPS, CIPM, TSG
5:00 PM – 6:00 PM	COCKTAIL HOUR WITH THE EXHIBITORS



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AGENDA DAY TWO: THURSDAY, MAY 25, 2023

8:00 AM – 9:00 AM	CONTINENTAL BREAKFAST WITH EXHIBITORS
9:00 AM – 9:10 AM	WELCOME BACK David Spaulding, DPS, CIPM, TSG
9:10 AM – 10:10 AM	PERFORMANCE REPORTING: BEYOND GIPS[®] Alicia Spencer, CIPM, Meradia Group; Matt Deatherage, Longs Peak Advisory Services; Christine Iannacone, CIPM, Prudential; Mark Elliott, SS&C; Matthew Liposky, MassPRIM
10:10 AM – 10:40 AM	BENEFITS AND PITFALLS OF OUTSOURCING: WHEN TO AND WHEN NOT TO Matt Caulfield, Archer
10:40 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	PERFORMANCE EVALUATION AND RISK WHEN RETURNS AREN'T NORMALLY DISTRIBUTED Dan diBartolomeo, Northfield Information Services
12:00 PM – 1:00 PM	LUNCH
1:00 PM – 1:50PM	EVALUATING BENCHMARK MISFIT RISK Stephen Campisi, CFA, The Pensar Group
1:50 PM – 2:50 PM	NEW SEC GUIDELINES: EXTRACTED PERFORMANCE AND ATTRIBUTION Steve W. Stone, Morgan, Lewis & Bockius; Thayne Gould, Vigilant; Christine Ayako Schleppegrell, Morgan Lewis
2:50 PM – 3:10 PM	AFTERNOON BREAK
3:10 PM – 4:00 PM	WHAT PERFORMANCE MEASUREMENT PROFESSIONALS DON'T KNOW ABOUT PERFORMANCE* David D. Spaulding, DPS, CIPM, TSG * BUT SHOULD
4:00 PM – 5:00 PM	CONFERENCE ENDS – RAFFLE PRIZES

