

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

AGENDA DAY ONE: WEDNESDAY, MAY 22, 2024

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	DATA MANAGEMENT: WHY IT IS MORE IMPORTANT THAN EVER? Steve O'Brien, Rimes; Jose Michaelraj, CIPM, CAIA, Meradia; Brian Buzzelli, Meradia; Mark Rothermel, CIPM, T. Rowe Price
9:55 AM – 10:40 AM	ESG: RISK, COMPLIANCE, AND REGULATORY REPORTING – WHY HAVING THE RIGHT TOOLS AND DATA IS ESSENTIAL Mark Parker, State Street
10:40 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	PATHS TO A “RICH” LIFE John Longo, Ph.D., CFA, Rutgers University - HISTORICAL STUDIES ON MONEY AND HAPPINESS - COMPONENTS OF HAPPINESS & THE “RICH” LIFE EQUATION - THE IMPORTANCE OF EFFECTIVE USE OF TIME ON THE PATH TO A RICH LIFE
12:00 PM – 1:00 PM	LUNCH
1:00 PM – 1:30 PM	ESSENTIAL SKILLSETS OF THE PERFORMANCE PROFESSIONAL Debi Rossi, CIPM, Kyza Performance; Christine Iannacone, CIPM, Prudential
1:30 PM – 2:00 PM	ARTIFICIAL INTELLIGENCE AND WHAT IT MEANS TO PERFORMANCE AND REPORTING Harald Collet, Alykmi
2:00 PM – 2:50 PM	GIPS® OCIO GUIDANCE STATEMENT – WHAT DOES IT MEAN FOR MY FIRM? Joshua O'Brien, CFA, Strategic Investment Group; Todd Juillerat, CFA; Amy Harlacher, The Common Fund; G. R. Findlay, CIPM, SSGA
2:50 PM – 3:15 PM	AFTERNOON BREAK
3:15 PM – 3:55 PM	HOW TO CALCULATE RETURNS ON OPTIONS, FUTURES, AND SWAPS Claude Giguere, Robust Technologies
3:55 PM – 4:35 PM	METHODS AND STYLES OF REPORTING: WHAT EFFORTS ARE WORTH IT AND WHAT FUNCTIONAL OPTIONS EXIST? Alex Shafran, CFA, Cohen & Steers; Frances Barney, CFA, BNY Mellon; Shankar Venkatraman, CFA, FRM, American Century
4:35 PM – 5:00 PM	PERFORMANCE JEOPARDY David Spaulding, DPS, CIPM, TSG



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AGENDA DAY TWO: THURSDAY, MAY 23, 2024

8:00 AM – 9:00 AM	CONTINENTAL BREAKFAST WITH EXHIBITORS
9:00 AM – 9:10 AM	WELCOME BACK/RECAP David Spaulding, DPS, CIPM, TSG
9:10 AM – 10:00 AM	DIETZ AWARD WINNER: BENCHMARK MISFIT: REDUX Stephen Campisi, CFA, The Pensar Group
10:00 AM – 10:50 AM	HOW ARE THE NEW SEC GUIDELINES BEING PRACTICALLY IMPLEMENTED AND APPLIED? Matt Deatherage, CFA, CIPM, Longs Peak; Lance Dial, K&L Gates; Thayne Gould, Vigilant
10:50 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	AI & RISK Dan diBartolomeo, Northfield Information Services
12:00 PM – 1:00 PM	LUNCH
1:00 PM – 1:50PM	PERFORMANCE CHALLENGES WITH PRIVATE EQUITY & ALTERNATIVES Mike Beck, CFA CIPM, Glenmede; Dan Golosovker, Addepar; Patrick Warren, MSCI; Tina Madel, Meradia; Cynthia Shaw-Pereira, CIPM, BNY Mellon
1:50 PM – 2:40 PM	GIPS® COMPLIANCE Q&A John D. Simpson, CIPM, TSG; Matt Deatherage, CFA, CIPM, Longs Peak; John Norwood, Norwood Consulting; Susan Agbenoto, CIPM, Opus Investment Management
2:40 PM – 3:10 PM	AFTERNOON BREAK
3:10 PM – 4:00 PM	WHAT'S MISSING FROM YOUR EQUITY ATTRIBUTION REPORT? - RISK - TRADING EFFECT - INTERACTION - INFLATION David D. Spaulding, DPS, CIPM, TSG
4:00 PM – 5:00 PM	CONFERENCE CONCLUDES – RAFFLE PRIZES

