

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

**AGENDA DAY ONE: WEDNESDAY, MAY 22, 2024**

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



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**AGENDA DAY TWO: THURSDAY, MAY 23, 2024**

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

