

AGENDA DAY ONE: WEDNESDAY, MAY 21, 2025

<b>8:00 AM – 8:45 AM</b>	<b>REGISTRATION &amp; CONTINENTAL BREAKFAST</b>
<b>8:45 AM – 9:00 AM</b>	<b>WELCOME</b> David Spaulding, DPS, CIPM, TSG
<b>9:00 AM – 10:00 AM</b>	<b>AI USE CASES AND BENEFITS FOR PERFORMANCE TEAMS</b>
<b>10:00 AM – 10:40 AM</b>	<b>PERFORMANCE ANALYTICS TECHNOLOGY &amp; PRESENTING PERFORMANCE</b> Ian Thompson, Ph.D., BNY; Alex Shafran, Cohen & Steers; & Shankar Venkatraman, CFA, FRM, American Century Investments
<b>10:40 AM – 11:10 AM</b>	<b>MORNING BREAK</b>
<b>11:10 AM – 12:00 PM</b>	<b>INVESTING IN A GLOBAL ECONOMY IN 2025</b> John Longo, Ph.D, Rutgers Business School
<b>12:00 PM – 1:00 AM</b>	<b>LUNCH</b>
<b>1:00 PM – 1:30 PM</b>	<b>HANDLING BENCHMARK MISFIT</b> Stephen Campisi, CFA, The Pensar Group & Debi Rossi, Kyza Performance Consulting
<b>1:30 PM – 2:00 PM</b>	<b>DEVELOPING STAFF FOR SUCCESS</b> Frances Barney, CFA; Ralph Medina, BNY; & Jocelyn Gilligan, CFA, CIPM, Longs Peak Advisory Services, LLC
<b>2:00 PM – 2:50 PM</b>	<b>SOURCING, CREATING, AND CLEANING DATA</b> Todd Swearingen, Rimes & Todd Juillerat, CFA
<b>2:50 PM – 3:15 PM</b>	<b>AFTERNOON BREAK</b>
<b>3:15 PM – 3:53 PM</b>	<b>CALCULATING LONG/SHORT PORTFOLIOS</b> John D. Simpson, CIPM, TSG
<b>3:55 PM – 4:35 PM</b>	<b>PERFORMANCE MEASUREMENT FOR PRIVATE MARKETS AND THE USE OF DERIVATIVES</b> Dax Johnson, CFA, CIPM, State Street
<b>4:35 PM – 5:00 PM</b>	<b>PERFORMANCE JEOPARDY</b>
<b>5:00 PM – 6:00 PM</b>	<b>NETWORKING &amp; DRINKS RECEPTION</b>

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**AGENDA DAY TWO: THURSDAY, MAY 22, 2025**

<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>DIETZ AWARD WINNER: A DECISION-BASED APPROACH TO RISK-ADJUSTED PERFORMANCE ATTRIBUTION</b> TBA
<b>10:00 AM – 10:50 AM</b>	<b>FIXED INCOME ATTRIBUTION - MANAGING EXPECTATIONS WHILE MEASURING THE VALUE OF YOUR DECISIONS</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>ADVANCES IN RISK MODELING</b> Dan diBartolomeo, Northfield
<b>12:00 PM – 1:00 AM</b>	<b>LUNCH</b>
<b>1:00 PM – 1:50 PM</b>	<b>RISK ATTRIBUTION</b> Claude Giguere, Robust Technologies
<b>1:50 PM – 2:30 PM</b>	<b>SEC MARKETING: HOW THE DIRECTION OF THE NEW ADMINISTRATION WILL IMPACT THE INDUSTRY</b> Lance Dial, K&L Gates; Thayne Gould, Vigilant; Matthew Deatherage, CFA, Longs Peak Advisory Services
<b>2:30 PM – 3:00 PM</b>	<b>PHANTOM ALPHA</b> David D. Spaulding, DPS, CIPM, TSG
<b>3:00 PM – 3:15 PM</b>	<b>CONFERENCE CONCLUDES - RAFFLE PRIZES</b>