

AGENDA DAY ONE: WEDNESDAY, MAY 21, 2025

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

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AGENDA DAY TWO: THURSDAY, MAY 22, 2025

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 – 10:00 AM	DIETZ AWARD WINNER: A DECISION-BASED APPROACH TO RISK-ADJUSTED PERFORMANCE ATTRIBUTION Luke Petrus, Ortec Finance
10:00 AM – 10:50 AM	FIXED INCOME ATTRIBUTION - MANAGING EXPECTATIONS WHILE MEASURING THE VALUE OF YOUR DECISIONS Stephen Campisi, CFA, The Pensar Group
10:50 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	ADVANCES IN RISK MODELING Dan diBartolomeo, Northfield
12:00 PM – 1:00 AM	LUNCH
1:00 PM – 1:50 PM	THE FUTURE OF DATA QUALITY: HARNESSING MACHINE LEARNING TO ENHANCE INVESTMENT OPERATIONS Jose Michaelraj, CIPM, CAIA, Meradia
1:50 PM – 2:30 PM	SEC MARKETING: HOW THE DIRECTION OF THE NEW ADMINISTRATION WILL IMPACT THE INDUSTRY Lance Dial, K&L Gates; Thayne Gould, Vigilant; Matthew Deatherage, CFA, Longs Peak Advisory Services
2:30 PM – 3:00 PM	PHANTOM ALPHA David D. Spaulding, DPS, CIPM, TSG
3:00 PM – 3:15 PM	CONFERENCE CONCLUDES - RAFFLE PRIZES

