

*The Journal of Performance Measurement*<sup>®</sup>

**Nineteenth Annual**

**International Performance Measurement, Attribution & Risk Conference (PMAR<sup>™</sup>)**

**AGENDA DAY ONE: TUESDAY, JUNE 22, 2021**

<b>8:00 AM – 9:00 AM</b>	<b>REGISTRATION &amp; CONTINENTAL BREAKFAST WITH THE EXHIBITORS</b>
<b>9:00 AM – 9:15 AM</b>	<b>WELCOME</b> <i>David Spaulding, DPS, CIPM, The Spaulding Group, Inc.</i>
<b>9:15 AM – 10:00 AM</b>	<b>TOTAL ACCOUNT ATTRIBUTION - WHO'S USING IT AND WHY?</b> <i>Steve Campisi, CFA, The Pensar Group - LIVE</i>
<b>10:00 AM – 10:45 AM</b>	<b>HOW THE PANDEMIC TAUGHT US TO TURN SMART BETA INTO REAL ALPHA</b> <i>Dan DiBartolomeo, Northfield Information Services - LIVE</i>
<b>10:45 AM – 11:10 AM</b>	<b>MORNING BREAK</b>
<b>11:10 AM – 12:00 PM</b>	<b>DIETZ AWARD WINNER: A FRAMEWORK FOR BENCHMARKING PRIVATE INVESTMENTS</b> <i>Jill Shaw, Cambridge Associates; Rich Carson, Cambridge Associates</i>
<b>12:00 PM – 1:00 PM</b>	<b>LUNCH</b>
<b>1:00 PM – 1:50 PM</b>	<b>DATA IMPACTS: PERFORMANCE RETURNS, RISING COST, AND HOW TO MANAGE IT ALL</b> <i>Mike Beck, CIPM, Glenmede Trust; Jeff Zion; Frank Farnesi, STP; John Matsikas, CFA, CIPM, Voya Investment Management</i>
<b>1:50 PM – 2:40 PM</b>	<b>MANAGING TEAMS IN A VIRTUAL ENVIRONMENT</b> <i>Alex Shafran, CFA, Cohen &amp; Steers; Diane Robertson, T. Rowe Price; Frances Barney, CFA, BNY Mellon</i>
<b>2:40 PM – 3:00 PM</b>	<b>AFTERNOON BREAK</b>
<b>3:00 PM – 3:50 PM</b>	<b>HOW THE NEW SEC MARKETING REGULATIONS AFFECT YOUR FIRM AND HOW IT DIFFERS FROM THE GIPS<sup>®</sup> STANDARDS</b> <i>Darren Mooney, Greylane - LIVE</i>
<b>3:50 PM – 4:30 PM</b>	<b>A DISCUSSION ON ENVIRONMENTAL, SOCIAL, GOVERNANCE (ESG)</b> <i>Rick Lacaille, State Street</i>
<b>4:30 PM – 5:00 PM</b>	<b>PERFORMANCE JEOPARDY</b> <i>David D. Spaulding, DPS, CIPM, The Spaulding Group, Inc.</i>
<b>5:00 PM – 6:00 PM</b>	<b>COCKTAIL HOUR WITH EXHIBITORS</b>



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**AGENDA DAY TWO: WEDNESDAY, JUNE 23, 2021**

<b>8:00 AM – 8:45 AM</b>	<b>REGISTRATION &amp; CONTINENTAL BREAKFAST WITH THE EXHIBITORS</b>
<b>8:45 AM – 9:00 AM</b>	<b>WELCOME BACK/RECAP</b> <i>David Spaulding, DPS, CIPM, The Spaulding Group, Inc.</i>
<b>9:00 AM – 9:40 AM</b>	<b>DIVE INTO PERFORMANCE ON DERIVATIVES WITH A FOCUS ON FUTURES</b> <i>Claude Giguere, Robust Technologies</i>
<b>9:40 AM – 10:00 AM</b>	<b>EMPOWERING THE CLIENT, AND ONE'S CAREER IN PERFORMANCE</b> <i>Mike Pfaff, Vanguard</i>
<b>10:00 AM – 10:50 AM</b>	<b>INTEGRATING PERFORMANCE DATA INTO CLIENT REPORTING SOLUTIONS (PANEL)</b> <i>Moderator: John D. Simpson, CIPM, The Spaulding Group; Alex Shafran, CFA, Cohen &amp; Steers; Timothy Jager, Meradia Group; Mike Beck, Glenmede</i>
<b>10:50 AM – 11:10 AM</b>	<b>MORNING BREAK</b>
<b>11:10 AM – 12:00 PM</b>	<b>COMBINING ACADEMIC AND PRACTITIONER INVESTMENT THEORIES</b> <i>John Longo, Ph.D., Rutgers University - LIVE</i>
<b>12:00 PM – 1:00 PM</b>	<b>LUNCH</b>
<b>1:00 PM – 1:50 PM</b>	<b>THE GIPS<sup>®</sup> STANDARDS 2020 - HOW ARE YOUR COLLEAGUES DEALING WITH THE UPDATE?</b> <i>Ashley Reeves, CIPM, The Spaulding Group, Inc.; Lisa Gentry, COHO Partners; Drew Peterson, Appleton Partners; Susan Agbenoto, Opus Investments</i>
<b>1:50 PM – 2:45 PM</b>	<b>EXPANDING YOUR KNOWLEDGE ON RISK-ADJUSTED PERFORMANCE</b> <i>David Spaulding, DPS, CIPM, The Spaulding Group, Inc. - LIVE</i>
<b>2:45 PM – 3:15 PM</b>	<b>AFTERNOON BREAK</b>
<b>3:15 PM – 4:30 PM</b>	<b>OPEN DISCUSSION</b> <ul style="list-style-type: none"><li>• <i>The GIPS<sup>®</sup> standards</i></li><li>• <i>Performance</i></li><li>• <i>Risk</i></li><li>• <i>Attribution</i></li><li>• <i>Data</i></li><li>• <i>Systems</i></li></ul>
<b>4:30 PM – 5:00 PM</b>	<b>CONFERENCE CONCLUDES</b>

