



MAY ROUNDTABLE DISCUSSION

Thursday 25 May 2006 at 6pm

THE CRITICAL ROLE OF CLIENT-FACING CONSULTANTS IN WINNING AND RETAINING BUSINESS – DO YOU REALLY KNOW THE RIGHT PEOPLE?

REGISTER NOW

Many of us know the key people who research our firms and those who are responsible for our relationship with them. How many of us, however, can claim to know as well, all the client-facing consultants, who play a major role in the retention of our business with their clients?

At this roundtable we will be debating who we need to know, why they are important to us winning and retaining business, and what we should be doing to ensure our future success with these key people. We hope to have representatives from a number of consultancies in the audience to widen the debate across the full range of consultants. This event is aimed at anyone in the client-facing role, including sales and marketing and client service. It is an ideal opportunity to extend your network among consultants and within AIMSE.

Speakers: Stuart Daly an actuary and consultant and Ian Burton of Mercer Investment Consulting – both well known and well respected consultants.
Moderator Frank Doyle.

**Venue: Insight Investments,
33 Old Broad Street,
London EC2N 1HZ**

Association of Investment Management Sales Executives

THE CRITICAL ROLE OF CLIENT-FACING CONSULTANTS IN WINNING AND RETAINING BUSINESS – DO YOU REALLY KNOW THE RIGHT PEOPLE?

6.00 Registration

6.30 Presentation by Stuart Daly, actuary and consultant

Before setting up his own consultancy advising fund managers in 2005, Stuart headed up the bond manager research team at Hewitt Associates. He also advised trustees on a range of topics including asset allocation, manager selection and liability driven investment.

Before joining Hewitt in 2000, Stuart, a qualified actuary, was a bond manager.

Presentation by Ian Burton, Mercer

Ian is a principal for Mercer's investment consulting business. He is responsible for consulting to a number of clients on a wide range of issues including investment strategy, manager selection, asset transfers and ongoing monitoring. As well as managing a team of consultants, he is also responsible for researching manager of managers as well as participating in Mercer's mainstream research process.

Ian has some 15 years of experience in various aspects of the investment business including actuarial, asset management and investment asset consulting. He joined Mercer in 1998 as part of the merger with Sedgwick Noble Lowndes.

7.30 Drinks & canapés



REGISTRATION

3 EASY WAYS TO REGISTER

- (1) Post: AIMSE International
First Floor, 7 Holyrood Street
London SE1 2EL
- (2) Fax: +44 20 7357 0124
- (3) Email: aimse@grcomms.co.uk

TERMS & CONDITIONS ARE YOU REGISTERED?

If you have not received a confirmation before the event please telephone **+44 (0)20 7378 7016** to confirm. With variable postal conditions your booking may be held up on its way to us, or your confirmation delayed in a similar way.

VAT

Under EU Customs & Excise regulations delegates from all countries are required to pay VAT on any event taking place in the EU.

CANCELLATION

All cancellations must be received in writing. Cancellations received 14 working days before the event will be issued with a refund less a **10% (+VAT)** service charge. Cancellations received between 14 and seven working days before the event will be issued with a refund less a **50% (+VAT)** service charge. It is regretted that no refunds will be made or invoices cancelled after this date. Substitutions are welcome at any time.

DISCLAIMER

It may be necessary for reasons beyond the control of AIMSE International to alter the content and timing of the programme or the identity of the speakers.

CONTACT INFORMATION

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MAY ROUNDTABLE - THURSDAY 25 MAY 2006 DO YOU REALLY KNOW THE RIGHT PEOPLE?

Please include all details below

(Dr/Mr/Mrs/Miss/Ms) Name: _____

Position: _____

Company: _____

Address: _____

City: _____

Post Code: _____

Country: _____

Telephone: _____

Fax: _____

Email: _____

FEES

Member Delegate Fee: £100.00 inc VAT

Non-Member Delegate Fee: £125.00 inc VAT

Enclosed is my cheque for £..... payable to AIMSE International.

Bank Transfer: To pay via bank transfer, please tell your bank to include the invoice number and the delegate's name in the transfer instructions.

Transfers should be made to: Lloyds Bank TSB, Knightsbridge Branch
Po Box 633, 79/81 Brompton Road,
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