



**AIMSE CONSULTANTS CONFERENCE**

**Thursday 14 September 2006**

**REACHING YOUR CLIENTS –  
WITH OR WITHOUT  
CONSULTANTS?**

**DON'T MISS THIS PRESTIGIOUS CONFERENCE**

- **HIGH PROFILE SPEAKERS**
- **OPPORTUNITY TO NETWORK AND ENGAGE  
IN DISCUSSION WITH INDUSTRY LEADERS**

See the attached programme and  
complete your registration immediately

**Venue: Inmarsat  
99 City Road  
London  
EC1Y 1AX**



## REACHING YOUR CLIENTS – WITH OR WITHOUT CONSULTANTS?

1:30-2pm **Registration**

2-2:30pm **Session 1 - A client's perspective**

Moderator - Mark Walker

The keynote speaker (TBC) will discuss general developments in the market looking at investment/product needs of pension schemes/investors, what this might mean for investment managers in terms of developing and marketing new products, and how the use of consultants might evolve. In particular, if the market is becoming more specialist, questions to consider might be:

- are the providers of the products themselves changing (e.g. more use of investment banks direct)?
- should managers be spending more time with potential clients rather than consultants?
- are clients looking to use more specialised consultants in some areas?
- what are the opportunities for consultants?

2:30-3pm **Session 2 - Selling unfamiliar products**

Moderator - Stephen Breban

Ian Peart - *Hewitts*

Michael O'Brien - *Barclays Global Investors*

Ian Peart will discuss the evolution of consultancies that provide advice on alternatives. Issues that will be considered include:

- how consultants help clients with unfamiliar/new products
- how managers should/could work with consultants to help educate clients
- what products have caused the most issues with clients
- can the larger consultancies be good at everything, or will more specialists emerge, and will they be successful?
- is it worth the investment to develop new capabilities?
- how to increase technical knowledge
- what's best? Generalist consultants with some knowledge of everything, or specialists with detailed knowledge in some areas?





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Michael O'Brien will discuss the difficulties in launching new products/alternatives and provide views on changes in the market that might affect the use of consultants, or the number and type of consultants used by clients. Topics discussed will include:

- differences between alternative and traditional product 'selling'
- changes to the way clients use their consultants
- how have consultancies adapted and changed
- have there been many new consultants in the market
- education of clients
- whether dumbing down/eliminating jargon works

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**3-3:30pm Coffee break**

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**3:30-4:30pm Session 3 - Selling to cynical consultants**

Moderator - Stephen Breban

Mark Nicoll - *Lane Clark and Peacock*

Speaker TBC - *Watson Wyatt*

Two consultant speakers will offer their views on issues including:

- developing capabilities to advise on alternatives/new products
- changes to client behaviour and perceptions of marketplace and their needs - do managers 'get it'?
- any notable changes to managers' marketing strategies, in the light of new products/alternative assets
- development of product specialists at managers
- is relationship management with consultants changing?
- advantages (and disadvantages) of being a big/small consultant when dealing with managers and clients
- overlap between consultant relations staff, direct marketing staff, investment professionals and others at managers
- does the regulatory environment help, or hinder, the manager/client/consultant relationship and the 'selling' process?
- are there any significant differences in behaviours across Europe?





## REACHING YOUR CLIENTS – WITH OR WITHOUT CONSULTANTS?

### 4:30-5:30pm **Session 4 - Heart by-pass**

Moderator - Mark Walker

Andrew Kirton - *Mercer Investment Consulting*

Plus consultant panel

Andrew Kirton will talk about the differences in the use of consultants in Europe, with particular reference to countries and types of client who have little use for consultants. Issues covered will include:

- the impact of different markets, regulatory environments and governance structures
- which types of clients have little use for consultants
- how institutional investors cope on their own
- do managers help or hinder the use of consultants in areas where consultants are often by-passed?
- how consultants demonstrate their value - added to consultant unfriendly (potential) clients

A consultant panel will take questions from the floor on the subject matter of the session and other comments.

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5:30pm

**Drinks and 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 or more 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

AIMSE International  
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7 Holyrood Street  
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**Tel:** +44 (0)20 7378 7016  
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## AIMSE INTERNATIONAL CONSULTANT CONFERENCE THURSDAY 14 SEPTEMBER 2006 REACHING YOUR CLIENTS – WITH OR WITHOUT CONSULTANTS?

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: £495.00 inc VAT

Non-Member Delegate Fee: £745.00 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,  
London, SW3 1DD

**Account Name:** AIMSE International **Account Number:** 0950527

**Sort Code:** 30-94-81 **Swift Code:** LOYDGB2L

**Please fax a confirmation of your bank transfer to AIMSE International  
on +44 (0)20 7357 0124**

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