

AIMSE Virtual Conference SCHEDULE AT A GLANCE

Wednesday, November 11, 2020		Session Description
3:30 pm ET – 5:00 pm ET	Bootcamp	<p><i>This pre-conference session is targeted toward those marketers new to the business as well as more experienced marketers looking to shift their sales performance into high gear. The goal of this session is to provide guidance on a “soup to nuts” approach to marketing success for both traditional and alternative products. The AIMSE Boot Camp is an opportunity to learn and ultimately succeed as this program was created by investment sales professionals for investment sales professionals. Topics will include:</i></p> <ul style="list-style-type: none"> • <i>Understanding the Investor Sales Cycle</i> • <i>Building a Team</i> • <i>Engaging Investors</i> • <i>Presentation Skills</i> • <i>Building Relationships</i> • <i>Due Diligence</i> • <i>Marketing Resources</i> • <i>Marketing Tips and Tricks</i>
5:00 pm ET – 6:00 pm ET	Virtual Live Networking with Mentor/Mentee Pairings	<p><i>Please join your mentor or mentee at the Mentor & Mentee Happy Hour at this year's annual AIMSE conference, held virtually, Wednesday, November 11th at 5pm EST.</i></p> <p><i>While we can't meet in person, we hope you'll take advantage of this one-hour happy hour immediately following the ever popular and informative Bootcamp. You can expect brief remarks from AIMSE leadership and the conference chairs before spending most of the time in breakout “rooms” with your mentor/mentee and one other mentor/mentee pairing. We want you to have the opportunity to deepen your relationships and make some new AIMSE friends.</i></p>
Monday, November 16, 2020		
12:00 pm ET – 12:10 pm ET	President's Welcome	
12:10 pm ET – 12:55 pm ET	Fireside Chat with Ron Peyton, Callan	<p><i>Ron Peyton, Executive Chairman, Callan, will share his thoughts on the evolution of the investment industry with a vision toward the future. He will discuss the evolving role of the consultant, changing risk dynamics, and the challenges facing investors, consultants and asset managers. He will also address the continued importance of building trust in relationships, firm culture and the value of diversity and inclusion.</i></p>
12:55 pm ET – 1:10 pm ET	Sponsor Chat Session/Virtual Networking Break	<p><i>Panelist after-session networking and general networking</i></p>
1:10 pm ET – 1:55 pm ET	Is Your Retirement SECURE? The Future of	<p><i>Sweeping changes are afoot for plan sponsors, consultants and asset managers alike with the recent passage of the Setting Every Community Up for Retirement Enhancement Act (SECURE) in December 2019. What types of provisions does this law introduce and what new investment design/structures/solutions will it</i></p>

	Retirement and Impact of Legislation and Trends	<i>allow? What impact will it have on the future of retirement in America and what types of challenges and opportunities for plan sponsors and asset management does it present? Join us for our defined contribution panel comprised of industry experts, consultants and plan sponsors to discuss this transformative legislation (such as the CARES Act) and other topics related to the security of America's retirement.</i>
1:55 pm ET – 2:10 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
2:10 pm ET – 2:55 pm ET	Managed Care: Investment Decision-Making Among Leading Healthcare Organizations	<i>COVID-19 has had an unprecedented impact on the country's healthcare system, and has impacted their outlook, liquidity and risk tolerance as they manage through a second wave and prepare for a Post-Covid environment. Join some of the healthcare industry's leaders in discussing how asset allocation will evolve in this post-COVID world, how they're navigating the uncertainty, and how they're positing for the future.</i>
3:15 pm ET – 3:45 pm ET	Consultant Roundtable #1	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm's priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we're bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
3:45 pm ET – 4:00 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
4:00 pm ET – 4:30 pm ET	Consultant Roundtable #2	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm's priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we're bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
5:00 pm ET – 6:00 pm ET	Networking	<i>Panelist after-session networking and general networking</i>
7:00 pm ET – 8:00 pm ET	Networking	<i>Panelist after-session networking and general networking</i>
Wednesday, November 18, 2020		
11:00 am ET – 11:30 am ET	Consultant Roundtable #3	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm's priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we're bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>

12:00 pm ET – 12:45 pm ET	State of the State: The Future of OCIO	<i>Grab Marty, Doc and Einstein because it's Back to the Future! The OCIO channel has been one of fastest growing segments of the institutional marketplace, but what's on the horizon for this business vertical? Did the pandemic serve to confirm the value proposition of the delegated model? What trends are in place to support the use of OCIO in the DB, DC, foundation, endowment and other market segments? Our experienced panel will discuss the current impact and expected long-term ramifications of COVID-19 on plan sponsors, with a focus on governance models, liquidity management and other key issues. The panel will also examine how asset managers can maximize the OCIO growth opportunity for their respective firms.</i>
12:45 pm ET – 1:00 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
1:00 pm ET – 1:45 pm ET	The Solution Chain – The Next Level of Identifying your Strongest Link	<i>Many are playing the "Solutions" card, but what exactly is Solution-Oriented Selling? Are solutions relegated to the largest, best resourced firms? Are solutions just a complicated investment management accessory, or a critical requirement for success amidst a rapidly changing business? This Solution-Oriented Selling Panel will define the components of solutions offered by managers and highlight approaches that managers can develop and embrace. Hear perspectives from the foremost solution practitioners.</i>
1:45 pm ET – 2:30 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
2:30 pm ET – 3:15 pm ET	Movers, Shakers and the Future of Finance	<i>As leaders in the investment community, this panel is an opportunity for you to share your ideas and views for investing in the unique investment environment we are in today. This year's conference theme is Past, Present and Future, so in what ways has your investment style evolved and what do you see as unique opportunities for your plans going forward? The added dimension of the COVID pandemic has impacted (and disrupted) many plans and as the steward of these plans we look forward to hearing how you all have navigated this difficult and important time, what changes you have made to adapt and how you're better prepared for the future. Your moderator Sam Gallo may have some thoughts as well as to how he would like to guide the panel discussion which he can share on our call, in the meantime here are a few questions that we might include/contemplate for the discussion:</i> <ul style="list-style-type: none"> <i>• What, if any, outside-the-box strategies might you be looking at or are interesting to you, that may be a departure from your "norm"?</i> <i>• How have due diligence processes evolved since COVID began?</i> <i>• How do you think they will evolve while COVID remains a threat?</i> <i>• What are some of your concerns or areas you think have improved in terms of the ways you'll be interacting with your clients or managers post-COVID?</i> <i>• Discuss the importance of diversity and social responsibility as it relates to generating performance and meeting the needs of your plans?</i> <i>• What patterns and common factors have you identified in poorly performing strategies and managers?</i>

		<ul style="list-style-type: none"> • <i>What keeps you up at night?</i> • <i>What lessons have you learned from mistakes?</i>
3:15 pm ET – 3:30 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
3:30 pm ET – 4:00 pm ET	Consultant Roundtable #4	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
4:00 pm ET – 4:15 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
4:15 pm ET – 4:45 pm ET	Consultant Roundtable #5	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
Friday, November 20, 2020		
10:45 am ET – 11:15 am ET	Consultant Roundtable #6	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
11:15 am ET – 11:30 am ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
11:30 am ET – 12:00 pm ET	Consultant Roundtable #7	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
12:00 pm ET – 12:15 pm ET	Sponsor Chat Session/Virtual	<i>Panelist after-session networking and general networking</i>

	Networking Break	
12:15 pm ET – 1:00 pm ET	Diversity and Inclusion Virtual Luncheon	Jocelyn Bell Burnell said, “The more diverse a research group or a business, the more robust it is, the more flexible it is, and the better it succeeds.” Join our virtual luncheon and listen to leading experts and practitioners from asset management and academia discuss striving towards diversity and moving toward more inclusivity, equality and justice. What are organizations doing to empower and retain people of all races, genders and religions to achieve their social and economic goals? How can we empower our workforces to better succeed and navigate biases? What are best practices for incorporating more diversity into investment portfolios?
1:00 pm ET – 1:15 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
1:15 pm ET – 1:45 pm ET	Consultant Roundtable #8	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
1:45 pm ET – 2:00 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
2:00 pm ET – 2:30 pm ET	Consultant Roundtable #9	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
2:30 pm ET – 2:45 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
2:45 pm ET – 3:15 pm ET	Consultant Roundtable #10	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
3:15 pm ET – 3:30 pm ET	Sponsor Chat Session/Virtual	<i>Panelist after-session networking and general networking</i>

	Networking Break	
3:30 pm ET – 4:00 pm ET	Consultant Roundtable #11	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>
4:00 pm ET – 4:15 pm ET	Sponsor Chat Session/Virtual Networking Break	<i>Panelist after-session networking and general networking</i>
4:15 pm ET – 5:00 pm ET	Consultant Roundtable #12	<i>A hallmark of AIMSE conferences, the virtual consultant roundtables will include a diversified group of field, traditional and alternative research consultants. Listen, learn, and adapt as top consultants share their firm’s priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. In this virtual environment, we’re bringing consultants from twelve leading consulting firms to the comfort of your own home in impactful 30 minute sessions.</i>