

CONFERENCE  
**PROGRAM**



**AIMSE 2012  
FALL CONFERENCE**

NOVEMBER 7, 2012

PRINCETON CLUB | NEW YORK, NY



# AIMSE 2012 FALL CONFERENCE

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## CFA Institute

CFA Institute has approved this program, offered by Association of Investment Management Sales Executives (AIMSE), for 7 CE credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE tracking tool.

# AIMSE 2012 FALL CONFERENCE

NOVEMBER 7, 2012

## AGENDA

7:15–5:30 pm 2nd Floor Enclave	<b>Registration</b>
7:15–8:15 am Alexander Hamilton 2nd Floor	<b>Breakfast</b>
8:15–8:30 am James Madison 2nd Floor	<b>Welcome Remarks</b>
8:30–9:30 am James Madison 2nd Floor	<b>Consultant Panel</b> <b>Moderator:</b> Greg Weissman, Putnam Investments <b>Speakers:</b> Tim Barron, Segal Rogerscasey Roger Fenningdorf, Rocaton Investment Advisors Bruce Graham, CFA, Clearbrook  The influence of consultants on the institutional marketplace is, to put it simply, immense. Far from stagnant, the consulting business continues to change with evolving market demands, business lines, consolidation, and spinoffs. In this popular panel we'll hear from the leadership of top consultants about the state of the industry and how to best position your firm for success.
9:30–10:30 am James Madison 2nd Floor	<b>The New Reality—Sales and Consultant Relations After the Great Recession</b> <b>Speakers:</b> George Wilbanks, Wilbanks Partners Adam Barnett, McLagan Partners  Retention of Key Professionals—This is the new growth strategy! In a business environment characterized by slower growth and limited resources, what types of best practices are developing in leadership and compensation systems? The panel will discuss motivational and development tools, evolving compensation systems and focus on key challenges and points of leverage in managing a successful distribution team through this difficult “new reality”.



**FALL CONFERENCE AGENDA**

10:30–11:00 am  
Alexander Hamilton  
2nd Floor

**Networking Break with Exhibitors**

11:00 am–Noon  
James Madison  
2nd Floor

**Finding the Right Balance in DC Plans:  
Implications of the Responsibility Shift**

**Moderator:** Anne Lester, J.P. Morgan Asset Management  
**Speakers:** Pete Gosselin, Gosselin Consulting Group, LLC  
Barbara Kontje, American Express  
Nathan Voris, R.V. Kuhns & Associates, Inc.

Join a panel of experts in exploring how the evolution of DC plans will shape both the products and services offered in 401(k) and other retirement plans.

- How can plan design in drive participant outcomes?
- Have target date funds “solved” the investment problem for DC participants?
- Will there be any winners in the search to develop an income solution?

12:00 Noon–1:15 pm  
Alexander Hamilton  
2nd Floor

**Lunch Presentation—Behavioral Finance**

**Speaker:** Thomas Collimore, CFA  
CFA Institute

An insightful and entertaining overview of Behavioral Finance featuring the most recent advancements and the implications for investors and managers alike. Whether leveraging these ideas to manage risk, protect against pitfalls or to pinpoint new investment opportunities, you will be able to bring these valuable ideas back to your firm to enhance returns.



1:15–2:15 pm  
James Madison  
2nd Floor

### **The Latest Mouse Trap—New Trends in Asset Allocation**

**Moderator:** Alison Bush Delgado, Neuberger Berman  
**Speakers:** Janine Baldridge, CFA, CAIA, Russell Investments  
Mark Caplinger, Summit Strategies Group  
John Linder, CFA, CPA, Pension Consulting Alliance, Inc.  
Tim McCusker, CFA, CAIA, FSA, NEPC

The panel of leading investment consultants will discuss their views on risk-based asset allocation, both the benefits and challenges.

- A discussion of new asset allocation trends and approaches institutions are adopting in order to meet lofty return goals
- A review of theory and background on risk-based asset allocation: from both a risk management and an investment standpoint
- Real-world, practical challenges and hurdles, from the current low-interest rate environment to potential regulatory changes

2:15–3:00 pm  
James Madison  
2nd Floor

### **Presenting for Results: Differentiating Your Message**

**Speaker:** Sims Wyeth, Sims Wyeth & Co.

Gather incredibly useful and easily implementable ideas to enhance you and your firm's communications.

- Whether you are a seasoned veteran or new to the business, Sims' advice will be invaluable
- Effective ideas and approaches to help differentiate your message and stand out
- Simple, yet powerful ideas that will help in all aspects of communication

3:00–3:30 pm  
Alexander Hamilton  
2nd Floor

### **Networking Break with Exhibitors**



**FALL CONFERENCE AGENDA**

3:30–4:30 pm  
James Madison  
2nd Floor

**Discussing the Outsourced CIO Phenomenon**

**Moderator:** Justin White, Casey, Quirk & Associates  
**Speakers:** Joseph Gelley, Russell Investments  
Debra Woida, Towers Watson

In recent years, interest in investment outsourcing has surged for pension funds, endowments, foundations, sovereign wealth funds, and health care organizations. Casey, Quirk & Associates predicts a 13% compound annualized growth rate for “outsourcing” in the U.S. institutional market through 2015. The spectrum of firms offering outsourcing is wide and continues to evolve, including traditional consultants, dedicated outsourcers and investment managers. The names they use to describe the services vary as well (outsourced, delegated, implemented, discretionary, fiduciary, etc.). This panel includes several of the largest, most successful outsourcing business models. We will help you sort through the outsourcing landscape to better understand what services are offered, how client programs are structured, and how they ultimately select investment managers and other vendors. Join us to learn how to work with outsource providers and effectively position your firm.

4:30–5:30 pm  
James Madison  
2nd Floor

**CIO’s—Insights and Access**

**Moderator:** Tim McAvoy, Marvin & Palmer Associates, Inc.  
**Speakers:** George Appleby, Burr Oak Group  
Peter Gerlings, CFA, CAIA, Segal Rogerscasey  
Russ Niemie, New York State Nurses

You won’t want to miss this panel of CIO’s as they share their insights and knowledge on:

- CIO Outsourcing
- Which assets classes in 2013 are likely to be hot and which are not
- What investment/market issues keep them awake at night
- Q&A: No holds barred

5:30–7:00 pm  
Alexander Hamilton  
2nd Floor

**Cocktail Reception**

# FALL CONFERENCE

## CONFERENCE CO-CHAIRS

### **Brian Crowell, CFA**

*Vice President*

AQR Capital Management, LLC



Brian, a Vice President at AQR, launched the firm's dedicated Consultant Relations team, which works with institutional investment consulting firms and covers all of AQR's investment strategies. He joined AQR in July 2007 as a member of the firm's Portfolio Solutions Group, where he worked with a number of the firm's institutional clients on a broad range of investment policy issues, and was co-author of a paper published in the Journal of Investment Strategy. Brian currently serves on the board of the Association of Investment Management Sales Executives. He earned his M.B.A. with concentrations in Economics and Analytic Finance from the Booth School of Business at the University of Chicago and his A.B. in Chemistry from Dartmouth College.

### **P. MacKenzie Hurd, CFA**

*Director of Client Service and Consultant Relations*  
Rainier Investment Management Inc.



P. MacKenzie Hurd works in Rainier's New York office as Director of Client Service and Consultant Relations. He previously worked for Callan Associates in San Francisco as a general consultant and shareholder. At Callan, MacKenzie developed and maintained institutional plan sponsor investment programs for West Coast clients. Prior to joining Rainier in 2011, MacKenzie was a Relationship Manager and Defined Contribution Specialist for The Capital Group Companies in their institutional investment services group. At the start of his career, MacKenzie also participated in a three-year fellowship with the U.S. Golf Association's foundation office, supporting junior golf for disadvantaged youth nationally.

MacKenzie earned a Bachelor of Arts in English from Dartmouth College. He has earned the right to use the Chartered Financial Analyst designation.

**George Appleby**

*Chief Investment Officer*  
Burr Oak Group



George is the Chief Investment Officer for Burr Oak Group, a family office providing investment management services to four generations of a prominent Midwestern family, their trust company and charitable foundations. He joined Burr Oak in 2001 and is responsible for developing investment policy recommendations including asset class and investment style selection. George also functions as the family's "Michael Clayton".

Prior to Burr Oak, George spent ten years as a retainer investment consultant to Taft Hartley plans and public funds with Independent Fiduciary Services, Merrill Lynch Consulting and Advisory, and Kidder Peabody. He implemented a highly disciplined approach to the process of analyzing, selecting and monitoring long only managers as well as alternative offerings.

George currently serves on the LP Advisory Board for INVESCO Real Estate Fund I, Westly Capital Fund II (a cleantech venture fund), and PineBridge Structured Capital Partners II.

**Janine Baldrige, CFA, CAIA**

*Managing Director, Alternatives Investment Practice*  
*Americas Institutional*  
Russell Investments



Janine Baldrige is Managing Director, Alternatives Investment Practice for Russell Investments. Janine leads Russell's alternative investment strategy research and investment policy development for North American institutional clients. From 2009 to 2011, Janine was the global head of consulting and advisory services and led the coordination of and strategic planning for Russell's global consulting and advisory practice. From 2003 to 2009, Janine led Russell's external hedge fund of fund research practice for advisory clients globally.

Janine was named managing director of Russell's U.S. institutional business in 2010, and has advised large institutional funds on all aspects of their investment programs, including investment policy, asset allocation, asset class strategy, manager selection, implementation strategies and performance analysis since 1988.



Janine joined Russell in 1979 in the firm's analytical services business, where she ultimately managed performance and analytical reporting for North American clients. Before Russell, Janine worked in corporate accounting at Weyerhaeuser Company in Tacoma, Washington.

She has co-authored several research papers published by Russell including, "Hedge Fund Evolution: Adapting to Global Market Conditions", "The Fiduciary's Guide to Investment Management," "Index Swaps" and "Capturing Alpha Through Active Currency Overlay" and authored the "Roadmap for Fiduciary Risk Management." Janine also speaks at industry conferences on governance and investment issues.

Janine is a member of the CFA Institute, the Seattle Society of Financial Analysts and the Chartered Alternative Investment Analyst Association®. Janine is a member and past co-chair of Russell's diversity and inclusion council.

B.A., Finance, University of Puget Sound, 1979  
CFA Charterholder, CFA Institute, 1999  
Chartered Alternative Investment Analyst  
CAIA Association, 2010

## **Adam Barnett**

*Head of Asset Management*  
McLagan Partners



Adam Barnett is McLagan's Head of Asset Management. Located in the firm's Stamford, CT office, Mr. Barnett provides total pay consulting services to investment management organizations, including advisory firms, mutual fund companies, banks, insurance companies, public funds, in-house managers, and hedge funds. Mr. Barnett's areas of expertise include:

- Designing annual and long-term incentive plans
- Designing sales compensation programs
- Conducting sales and financial performance benchmarking studies
- Analyzing competitive pay practices and levels
- Providing counsel about pay and business trends to senior management teams and Board of Directors.

Mr. Barnett also leads McLagan's global compensation survey program for investment management organizations. Currently, this program covers investment management staff in 15 countries. In the U.S., over 300 investment management organizations

## MODERATORS & SPEAKERS

participate in our surveys, including 49 of the top-50 asset management firms (per Pensions & Investments).

Mr. Barnett joined McLagan in 1994. Before that, he was a consultant in Towers Perrin's executive compensation practice in New York, the controller of US Marathon Ltd, and a financial analyst at Chemical Bank.

Mr. Barnett received an M.B.A. degree from New York University in 1988 and a B.S. degree from New York University in 1984.

### **Timothy R. Barron**

*Chief Investment Officer*  
Segal Rogerscasey



Tim Barron is the Chief Investment Officer of Segal Rogerscasey, responsible for management of the firm's research department and oversight of all investment activities. Tim was previously President and CEO of Rogerscasey and its head of Research. He joined Rogerscasey in 2002 and now has 35 years of experience in the investment industry.

Before joining Rogerscasey he was Director of U.S. Institutional Client Development at Muzinich & Co., a high yield bond investment specialist firm. Prior to that, he was a principal at Morgan Stanley Dean Witter Investment Management. He was a Managing Director and Senior Consultant at BARRA RogersCasey, where he led a team providing consulting services to a variety of clients and had held a similar role at Watson Wyatt Asset Consulting. Tim was also the Chief Investment Officer for the Virginia Retirement System, and the Executive Director of the City of Richmond Retirement System.

Tim graduated with a B.A. in Philosophy from Emory University. He also received an M.B.A. in Finance from Georgia State University. He is the past chairman of the Finance and Investment Committees of the Girl Scouts of Southwestern Connecticut and has been a team co-captain for the Ridgfield Relay for Life.

## **Alison Bush Delgado**

*Managing Director*  
Neuberger Berman



Alison Bush Delgado, Managing Director, joined the firm in 2007. Alison is the Head of Consultant Relations. Prior to joining the firm, Alison was a vice president and consultant at Callan Associates, Inc. Prior

to that she was director and head of Institutional Marketing and Client Service at New York Life Investment Management, assistant vice president in Marketing and Product Development at United Asset Management, a marketing officer in Global Investment Management at Bankers Trust Company and an analyst at The Lindner Funds, where she spent five years. Alison received a B.A. in Economics at Eastern Illinois University.

## **Mark Caplinger, CFA**

*Senior Vice President*  
Summit Strategies Group



Mark is a Senior Vice President in Summit's Consulting group, and a firm shareholder. Prior to joining the firm in 2001, Mark was the Chief Investment Officer of the Teachers' Retirement

System of the State of Illinois, a \$21 billion public pension fund. In addition, he previously served as the Chief Investment Officer of the Public School Retirement System of Missouri (\$18 billion) and as a Senior Investment Officer on the staff of the Missouri State Employees' Retirement System (\$5 billion).

Mark holds a B.A. from Westminster College and an M.B.A. from the University of Missouri. He is also a CFA charterholder and a member of the CFA Society of St. Louis. When not working, Mark enjoys spending time with his family, friends, the outdoors and Missouri Tiger football.

**Roger Fenningdorf**

*Partner, Head of Manager Research*  
Rocaton Investment Advisors



Roger Fenningdorf, Head of Global Manager Research, is a founder and Partner of Rocaton. Roger is responsible for setting the firm's manager research agenda and also spends a significant amount of his time researching hedge fund and U.S. equity strategies and managers. Roger joined Rocaton after 8 years at Barra RogersCasey where he served as Managing Director, Head of Global Manager Research, and served as portfolio manager for two fund of funds strategies. Roger is a holder of the CFA designation and a member of the CFA Institute and the Stamford Society of Financial Analysts. Roger earned an M.B.A. in Finance and International Business from Yale University School of Management and a B.A. in Economics from Tufts University.

**Joseph Gelly**

*Managing Director, Fiduciary Solutions*  
Russell Investments



Joseph Gelly is the Managing Director of Fiduciary Solutions for Russell Investments institutional business in the Americas. In addition to driving awareness and consideration of fiduciary solutions for institutional investors, Joe provides strategic direction on best practices, governance, competitive capabilities and refining Russell's value proposition. To broaden the adoption of fiduciary solutions, Joe is an active speaker at industry roundtables and conferences and is involved in the development of thought leadership papers.

Prior to joining Russell in 2010, Joe was Executive Vice President, Institutional Solutions at Congress Asset Management where he led a team with national responsibility for sales, client service, marketing and consultant relations. From 1999 to 2008, Joe was with SEI Investments where he held various executive roles including Managing Director & National Sales Manager for their Global Institutional Group.

Prior to SEI, Joe was Director of Major Account Sales at Gateway and spent time with Universal Asset & Honeywell before that. Joe has 25 years experience in the field of marketing, sales & executive management with extensive background in providing defined benefit, defined contribution & customized investment solutions to corporate, multi-employer, healthcare and non-profit clients.

Joe is the managing director of fiduciary solutions and is a registered representative of Russell Institutional Services Inc., an SEC registered investment adviser and FINRA member firm.

### **Peter Gerlings, CFA, CAIA**

*Senior Vice President, Investment Solutions*  
Segal Rogerscasey



Peter Gerlings, CFA, CAIA is a veteran investment consultant with over 20 years of institutional investment experience. He is responsible for Segal Rogerscasey's Implemented Investment Solutions platform, which includes MasterManager, target date retirement funds, and model portfolios for financial intermediaries. He is also a member of the firm's Manager Review Committee, which evaluates both traditional and non-traditional manager recommendations, and the Economic Advisory Committee.

Prior to joining Segal Rogerscasey, Peter was with K2 Advisors, a leading hedge fund of funds manager, and was based in their London office. While at K2, Peter helped develop a series of portable alpha, real return and liability-driven investment solutions.

From 1993 to 2007, Peter was with New England Pension Consultants, where he focused on manager research for both traditional asset strategies and later alternative assets, including hedge funds, private equity and real estate. In addition to his research responsibilities, Mr. Gerlings also consulted to various sophisticated pension, endowment, foundation, Taft-Hartley and family office clients in Europe and the United States.

Peter received his Bachelor's degree from the University of Nebraska at Omaha in 1987, and his M.B.A. from Boston University in 1993. He is a holder of the CFA Institute's Chartered Financial Analyst (CFA) designation, as well as the CAIA designation from the Chartered Alternative Investment Analyst Association. He is also a member of the Boston Security Analysts Society.



**Peter J. Gosselin, AIF®**

*Managing Partner and Co-Founder*  
Gosselin Consulting Group, LLC



Peter is a Managing Partner and Co-Founder of Gosselin Consulting Group, LLC and brings 18 years of industry experience to the firm. Peter has spent the last 16 years of his career working extensively with large- and mega-sized institutional Defined Contribution plan sponsors in the areas of fiduciary oversight, investment policy design, manager monitoring/selection, and plan pricing/financing. He has extensive experience developing investment manager research models and was the architect behind the research platforms at his previous employers.

Peter serves as the firm's Chief Investment Officer and leads its investment research and selection committee. He is a frequent speaker at industry events. Peter has earned the Accredited Investment Fiduciary® (or AIF®) professional designation from Fiduciary360. He has received formal training in investment fiduciary responsibility.

**Bruce L. Graham, CFA**

*Senior Managing Director*  
Clearbrook



Bruce L. Graham, CFA, Senior Managing Director Bruce joined Clearbrook in 1985. He is a member of the firm's investment committee and provides investment guidance to corporate, nonprofit, and high net worth clients. Bruce has more than 30 years experience working with clients to facilitate asset allocation studies, manager searches, plan design, performance measurement, and various technical projects. He has also worked closely with many financial institutions to build both traditional and alternative investment platforms, including the design and allocation of fund of hedge funds.

Bruce is a frequent speaker on investment options and plan design for Defined Benefit and Defined Contribution plans. Prior to joining the firm, Bruce spent several years as an institutional investment consultant at Merrill Lynch & Co. He was also President of Shields Associates, Clearbrook's predecessor firm. He is a CFA charterholder and a member of CFA Institute and the New York Society of Security Analysts. Bruce received his B.A. in Economics from Bucknell University and his M.B.A. in Finance from New York University.

## **Barbara Kontje**

*Director of Global Retirement and Smart Saving*  
American Express

Barbara Kontje is the Director of Global Retirement and Smart Saving. She is responsible for the oversight, administration and strategy for all American Express global retirement plans. Barbara serves on several retirement governance committees including the U.S. and Canada.

Barbara's responsibilities include the leadership of American Express' employee financial wellness program, Smart Saving. The intent of the Smart Saving program is to bring a more holistic perspective of the benefits offered by American Express to its employees to make it easier to support not only retirement savings, but the general financial wellness of each employee. This program incorporates retirement education as well as general financial education to provide useful tools and resources to employees.

Barbara has a B.A. from the College of New Jersey and an M.B.A. from Pace University in New York.

## **Anne Lester**

*Managing Director*  
J.P. Morgan Asset Management



Anne Lester, Managing Director, is Portfolio Manager for J.P. Morgan Asset Management's Global Multi-Asset Group (GMAG). She is a seasoned asset allocation specialist who developed and

helps manage J.P. Morgan's SmartRetirement target-date funds. As the architect of our SmartRetirement strategy, Anne is working to help define and determine the potential applicability of our investment process and strategy to retirement issues faced by corporations and governments worldwide, as many organizations begin shifting some or all of the responsibility for retirement investing and spend-down to individuals. Ms. Lester is also a member of the portfolio management teams of the J.P. Morgan Income Builder Fund, a diversified global portfolio of income producing securities, and the J.P. Morgan Diversified Real Return Fund, a diversified portfolio of inflation sensitive assets.

Ms. Lester, who started at J.P. Morgan in 1992, worked as a fixed income and currency trader and portfolio manager in the Milan office prior to her move to GMAG in 2000. Before beginning her career with

## MODERATORS & SPEAKERS

J.P. Morgan, Ms. Lester was a Fulbright Scholar in 1990, spending more than a year in Tokyo working for a member of the Japanese Parliament. She had previously worked for the U.S. Senate Government Affairs Committee.

Ms. Lester earned an M.A. in international economics and Japan studies from Johns Hopkins University's School for Advanced International Studies, and received her A.B. in politics from Princeton University.

### **John Linder, CFA, CPA**

*Principal*

Pension Consulting Alliance, Inc.



Mr. Linder joined PCA in 2009. He has lead consultant responsibilities for several clients, and consults to PCA relationships representing over \$500 billion in client assets. In addition to his client facing responsibilities, he conducts ongoing capital markets and investment strategy research. Prior to joining PCA, he was a Partner and Senior Investment/Tax Strategist at CTC Consulting in Portland, Oregon. He currently provides ongoing advice to investment committees, boards, and executive staff of plan sponsors across a broad range of ongoing investment issues. In addition to ongoing retainer

consulting duties, his project consulting engagements have included: analyzing and presenting an absolute return/alternative return strategic classes (Oregon Investment Council), restructuring the strategic class framework (CalPERS), consulting on risk measurement and management (CalSTRS), leading asset-liability studies, and conducting absolute return and private partnership due diligence reviews.

Prior 2004, he was engaged in various financial market roles including senior buy-side equity analyst at Alsin Capital, manager of business valuation and litigation services with the CPA firm Larson Allen Weishair & Co, LLP, and began his career in the financial services industry in 1996 at the CPA firm McGladrey & Pullen, LLP.

Mr. Linder has been a speaker at multiple conferences including Pension Bridge, IMN Public Fund Summit, SACRS, IMN Global Indexing, and the Institutional Investor Alpha Hedge Conference. He is a CFA charter holder and a member of the CFA Society of Portland, as well as a Board Member of the Portland Alternative Investment Association. He is a Certified Public Accountant (CPA). He received his B.A. in economics from Middlebury College magna cum laude, and his Masters of Accountancy (MAC) from the Kenan-Flagler School of Business at UNC Chapel Hill.

## **Tim McAvoy**

*Director of Client Service & Marketing and a Principal  
Marvin & Palmer Associates, Inc.*



As the Director of Client Service & Marketing and a Principal of the firm, Tim is responsible for managing and marketing investment products and serving as a client service point of contact.

Prior to joining the firm in 1999, Tim was a Business Director with SmithKline Beecham, in charge of its Managed Healthcare sales organization. Throughout his 18 years with SmithKline, Tim held various sales and marketing roles in the U.S. and Canada.

Tim has served as President of the Association of Investment Management Sales Executives (AIMSE), has a B.A. degree from The Pennsylvania State University and holds a Series 7 and 63 license.

## **Timothy F. McCusker, CFA, CAIA, FSA**

*Partner, Director of Traditional Research  
NEPC*



Tim joined NEPC in 2006 and began his career in the investment industry in 2002. At NEPC, Tim is exposed to a variety of client types. He specializes in asset allocation and asset-liability studies and is

a member of the Asset Allocation committee. He is also the lead member of the GAA and Real Assets Advisory Groups and a member of the Emerging Manager Advisory Committee. In supporting clients, Tim is primarily responsible for the development and monitoring of investment policies and objectives, the modeling and implementation of asset allocation and asset/liability studies, the evaluation and selection of investment managers, and the measurement and analysis of investment performance.

Prior to joining NEPC, Tim was an associate at Towers Perrin, where his responsibilities included preparing benefit valuation results, addressing plan asset-liability issues, conducting plan design studies, and determining the impact of different benefit strategies on corporate pension plans.

He also consulted with and educated clients on emerging regulatory changes including the Pension Protection Act and new financial disclosure requirements and coordinated conversions of clients to a new valuation system.

Tim earned his B.A. in Mathematics from Colgate University. He is a Fellow of the Society of Actuaries, holds the Chartered Financial Analyst (CFA) and Chartered Alternative Investments Analyst (CAIA) designations.

**Russell M. Niemie**

*Chief Investment Officer*

New York State Nurses Association Pension Plan & Benefits Fund



Mr. Niemie has been employed in institutional investing for over 30 years and has been the Chief Investment Officer for the New York State Nurses Association Pension Plan & Benefits Fund since 2000.

The NYSNA portfolio has been one of the top performing pension plans over the past 12 years. Mr. Niemie's responsibilities include all aspects of the Plans investment portfolio from strategic planning to implementation.

Prior to his position with NYSNA, Mr. Niemie was President and Chief Investment Officer of Commerce Capital Management in Memphis, TN and the Chief Investment Officer for the Employee Retirement System of Texas. Mr. Niemie completed his graduate work at the University of Texas in Austin and his undergraduate work at Arizona State University in Tempe, AZ.

Mr. Niemie resides in Albany, NY and Palm Beach, FL.

**Nathan Voris**

*Consultant*

R.V. Kuhns & Associates, Inc.

Nathan is a Consultant with R.V. Kuhns & Associates, Inc. (RVK) in the Chicago office and is a member of the Defined Contribution Solutions Group within RVK. Nathan joined the firm in 2011, with 10 years of prior experience in the defined contribution marketplace. He spent much of his career on the plan sponsor side of the business, managing retirement programs for sponsors such as Walmart and The Ohio Public Employees Retirement System. Nathan has expertise in many aspects of defined contribution plans, including target date funds, advice/managed accounts, stable value, income solutions, investment menu design, and plan provider analysis. Most recently, Nathan was a Consultant in the



Retirement Solutions group at Ibbotson Associates; a Morningstar company, where he was responsible for constructing custom target date and risk-based models for large plan sponsors and plan providers. Nathan earned a Bachelor of Science degree from the Ohio State University.

### **Greg Weissman**

*Consultant Relations Director*  
Putnam Investments



Mr. Weissman is a Consultant Relations Director for Putnam Global Institutional Management. In this role, he is responsible for managing relationships with investment consultants in the Eastern region of the United States. Mr. Weissman, who holds his Series 7 and 63 licenses with FINRA, is on the board of Proctor Academy and the Association of Investment Management Sales Executives (AIMSE). He joined Putnam in 2011 and has been in the investment industry since 2000. Past experience includes Old Mutual Asset Management as Senior Vice President, Director of Consultant Relations and Cowen & Company, Jefferies, Pacific Crest Securities, SoundView Technology Group. Mr. Weissman received his B.B.A. from Southern Methodist University, B.B.A.

### **Justin R. White**

*Director*  
Casey, Quirk & Associates



Justin has been in the investment management industry for nearly 12 years. His consulting work has included a wide array of assignments focused on business strategy, organizational design, global distribution, investment capability assessment, and product development.

Client organizations have included both traditional and alternative managers focused on the global institutional, retail, and high-net-worth markets. Justin has also led many of Casey Quirk's retail-oriented projects, including those focused on the distribution of intermediary-sold mutual funds, ETFs, and retirement products.

Justin is a co-author of Casey Quirk's 2009 white-paper *Target-Date Retirement Funds: The New Defined Contribution Battleground* and is a member of the Profit Sharing/401k Council of America's research committee.

Prior to joining Casey Quirk in 2008, Justin was a Senior Market Research Analyst at Fidelity Investments Institutional Services, where he performed analyses for marketing, distribution, finance, and business planning issues for Fidelity and its related businesses. Justin also worked as a wholesaler at Fidelity from 2001-2003 selling mutual funds, 401(k) programs, and other retirement products.

Justin graduated with a B.A. in Economics and Political Science from the University of Rochester and received his M.B.A. from the Stern School of Business at New York University.

### **George Wilbanks**

*Partner*

Wilbanks Partners LLC



George Wilbanks spent the last 26 years building the asset and wealth management practice at Russell Reynolds Associates to an industry leading position. Earlier he had worked with a venture capital and family office business Agtek International, and then The Dreyfus Corporation in business development as Assistant to the Chairman. A graduate of Williams College with a degree in Political Philosophy, he subsequently earned his M.B.A. in marketing at New York University's graduate business school.

### **Debra Woida, CPA**

*Director of Delegated Services*  
Towers Watson



Debra K. Woida is a Director of Delegated Investment Services for Towers Watson Investment Consulting. She assists clients in establishing investment policies and objectives, and implementing the policy established which includes selecting investment managers, rebalancing and maintaining asset allocation, communication with investment managers, and investment performance monitoring.

Prior to joining Watson Wyatt, Debra spent 15 years in various corporate finance positions and most recently held an assistant treasurer position at Rockwell Automation. There, she had primary responsibility for managing Rockwell's global defined benefit and defined contribution plan assets. Her experience also includes assurance and advisory work with Ernst & Young in Milwaukee, Wisconsin.

Debra holds a Bachelor of Business Administration in accounting and an M.B.A. from the University of Wisconsin. She is also a Certified Public Accountant.

## Sims Wyeth

*President*

Sims Wyeth & Co.



Sims Wyeth is the President of Sims Wyeth & Co., an executive development firm devoted to the art and science of effective communication.

He provides consulting, seminars, and executive coaching designed to help accomplished people become more persuasive and influential.

His background as an actor, director, and teacher of rhetoric informs his ability to design communication strategies, develop clear messages, and improve the presence and impact of anyone who wants to get an audience to make a decision.

His clients include AQR Capital Management, Fiduciary Trust International, AIG, Capital Partners, Abbott Capital Management, Deutsche Bank, Roche, Genentech, and hundreds of other firms in professional services and scientific/technical industries. He has also served on the faculties of New York University, Temple University, The University of New Orleans, and The New School for Social Research.

He lives in Montclair, New Jersey with his wife, the author Sharon Dennis Wyeth.





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to generate business opportunities and research potential, new and completed pension fund and nonprofit fund sponsor mandate activity from around the world. Our database contains thousands of fund sponsor profiles, including key contacts, related consulting firms, RFPs, recent news and other key data—all integrated and easily accessible to help you win business.

The service is customized for each user and personalized to deliver relevant, timely reports to each firm on an ad hoc basis. Users get the latest trends and analysis with editorial expertise providing deep industry insight. iiSEARCHES is not just a database. Subscribers also benefit from prepared summary reports plus the Global Money Management Quarterly providing detailed analysis and trend coverage on the global asset management industry.

**For More Information Contact:**

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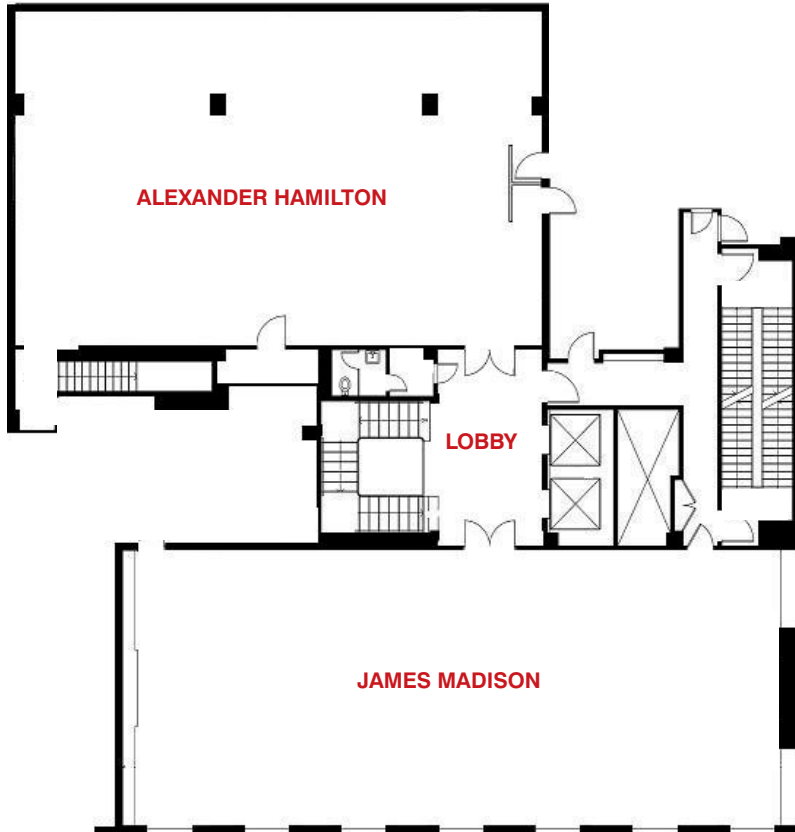
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