

**The Center For Investment Training**  
**"Callan College" for Investment Managers**  
**September 20-22, 2011**  
**Back Bay Hotel, Boston**



**Improving Communication Skills and Best Practices**

**Tuesday, September 20, 2011**

7:30 am to 8:00 am	<i>Breakfast</i>
8:00 am to 8:30 am	<b>Introduction and Welcome Remarks</b> <b>Kevin Dolsen</b>
8:30 am to 10:00 am	<b>Review of the Asset Management Process</b> <b>Kevin Dolsen</b> <i>Understand the language and theory of the Asset Management process and how you can use it to build stronger communication ties with your clients.</i>
10:00 am to 10:15 am	<i>Break</i>
10:15 am to 12:00 pm	<b>Current Industry Trends Panel</b> <b>Kevin Dolsen, Mark Stahl, Judy McKinney</b>
12:00 pm to 1:15 pm	<i>Lunch</i>
1:15 pm to 2:45 pm	<b>Manager Structure</b> <b>Kevin Dolsen</b> <i>The Manager Structure module will help participants understand how and why specific investment types are selected. It is useful in giving participants an appreciation of the role various investment styles and products play in the structure of plans and how those roles evolved.</i>
2:45 pm to 3:00 pm	<i>Break</i>
3:00 pm to 4:30 pm	<b>Manager Search</b> <b>Mark Stahl</b> <i>What goes on before a plan sponsor does a search? What issues, process and decisions led to the search? What are the characteristics of successful products?</i>
4:30 pm	<i>Adjourn</i>
5:45 pm	<i>Dinner</i>

**Wednesday, September 21, 2011**

7:30 am to 8:00 am	<i>Breakfast</i>
8:00 am to 9:30 am	<b>Communication Best Practices</b> <b>Anne Maloney</b> <i>How do successful firms meet the communication challenge? What are the "best practices" for consultant relations, sales and marketing and client service professionals?</i>
9:30 am to 10:15 am	<b>Presentation Skills</b> <b>Keith McDowell</b> <i>Six qualities in presentations have the greatest impact on your audience. Whether your goal is to win new business, cross-sell to an existing client or enhance your existing client relationships, by mastering the "6 P's" you will become a more skilled and effective communicator.</i>
10:15 am to 10:30 am	<i>Break</i>
10:30 am to 11:45 am	<b>Presentation Skills (cont.)</b>

**The Center For Investment Training  
 "Callan College" for Investment Managers  
 September 20-22, 2011  
 Back Bay Hotel, Boston**



Wednesday, September 21, 2011 (cont.)	
11:45 am to 12:00 pm	<b>Presentation of Case Study</b> <b>Callan Consultants and Keith McDowell</b> <i>Three Challenges will be presented for the groups to work on. Each will contain elements addressing the previous day's material.</i>
12:00 pm to 1:00 pm	<i>Working Lunch</i>
1:00 pm to 5:00 pm	<b>Case Study Workshops – Breakout into 3 Groups</b> <b>Attendees</b> <i>Meet the communications challenge in these dynamic workshops. Working as groups you will use the skills and knowledge you received in the previous day and a half to work out a problem and present a solution on Wednesday. During this session Callan consultants will circulate as facilitators.</i>
5:00 pm	<b>Adjourn</b>
Thursday, September 22, 2011	
7:30 am to 8:00 am	<b>Continental Breakfast</b>
8:00 am to 10:00 am	<b>Presentation of Case Studies by Groups</b>
10:00 am to 10:15 am	<i>Break</i>
10:15 am to 11:45 am	<b>Presentation of Case Studies by Groups</b>
11:45 am to 12:30 pm	<b>Feedback, Input and Critique</b>