

“Callan College” for Investment Managers Agenda

- *Process, Search, and Communications*

March 30 – April 1, 2021 Times Listed are Pacific Time (PT)

Tuesday, March 30, 2021	
8:30 am	Introduction and Welcome Remarks
8:45 - 9:30am	Review of the Asset Management Process (Part I) Jay Kloepfer <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. Note: Add questions. Anne and Joan can be in session to assist with making sure conversation is moving forward.</i>
9:30 – 9:45am	Break
9:45 – 10:30am	Review of the Asset Management Process (Part II) Jay Kloepfer <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>
10:30 – 10:45am	Break
10:45 – 11:30am	Manager Structure: Mike Joecken 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.
Wednesday, March 31, 2021	
8:30 - 8:45 am	Welcome Remarks: Anne Maloney
8:45 – 9:30 am	Defined Contribution: Jamie McAllister
9:30 – 9:45am	Break
9:45 – 10:30am	Question and Answer about all the morning subjects
10:30-10:45am	Break
10:45 - 11:30am	Manager Search: Public Markets –Lauren Mathias, CFA <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>
Thursday, April 1, 2021	
8:30 - 8:40 am	Welcome Remarks: Anne Maloney
8:40 – 9:30 am	Manager Search: Private Markets –Ashley Deluce, CAIA <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? What are the differences in the search process from public markets?</i>
9:30 – 9:45 am	Break
9:45 – 10:30 am	Communication Best Practices: Anne Maloney <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>
10:45 – 11:30am	Current Industry Trends Panel: Callan Consultants
11:30 am	Wrap-Up and Conclusion