

“Callan College” for Investment Managers – Agenda

March 22-24, 2022 – Boston – Times are Eastern Time (ET)

Tuesday, March 22

7:30am	Breakfast
8:00am	Introduction and Welcome Remarks – Anne Maloney
8:30am	Review of the Asset Management Process <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>
10:00am	Break
10:15am	Manager Structure <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>
12:00pm	Lunch
1:15pm	Current Industry Trends Panel Callan Consultants: TBD Moderator: Joan Dorow
2:30pm	Break
2:45pm	Manager Search <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>
4:30pm	Adjourn
5:00pm	Dinner

Wednesday, March 23

7:30am	Breakfast
8:00am	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>
9:30am	Break
9:40am	Presentation Skills – Anne Maloney <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>
10:15am	Break
10:30am	Presentation Skills (continued)
11:45am	Presentation of Case Study <i>Three Challenges will be presented for the groups to work on. Each will contain elements addressing the previous day’s material.</i>
12:00pm	Working Lunch
1:00pm	Case Study Workshops – Breakout into 3 Groups Attendees <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>
5:00pm	Adjourn

Thursday, March 24

7:30am	Continental Breakfast
8:00am	Presentation of Case Studies by Groups
10:00am	Break
10:15am	Presentation of Case Studies by Groups
11:45am	Feedback, Input and Critique