

## “Callan College” for Investment Managers – Agenda

October 12-14, 2022 – Boston – Times are Eastern Time (ET)

### Wednesday, October 12

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

**Thursday, October 13**

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

**Friday, October 14**

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