# EI3 EVESTMENT INSTITUTIONAL INVESTMENT INTELLIGENCE CONFERENCE 2016

## THRIVE.

## November 9-11, 2016 | Atlanta, GA

**www.ei3conference.com**

The eVestment Institutional Investment Intelligence (EI3) Conference is hosted for clients of eVestment solutions from both the investor and manager communities. Our objective with EI3 is to explore the big picture gained from eVestment's unique position in the industry, reveal how your peers leverage data & analytics to improve outcomes and to offer an opportunity for you to influence the roadmap of current and future solutions.

## Wednesday, November 9, 2016

| *Pre-conference workshops are open to registered attendees of EI3 at no additional cost. Space is limited.* | |
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| 1:00pm-5:00pm<br>*Ardmore Room* | ***Hands on Learning Lab for Managers** ****SESSION FULL****<br>**Who Should Attend?**<br>Sales, Marketing, Analyst and Product Strategy professionals at Traditional Asset Manager firms who want to use data intelligence to better differentiate, market and sell their products.<br>**Lab Format:**<br>eVestment data experts will explain key concepts and provide technical demonstrations, then lead participants through case studies to apply what they're learning.<br>**Curriculum:**<br>*1. How to Target Your Marketing Efforts*<br>*2. Seeing Your Products in Context:* How to map your competitive landscape.<br>*3. Finding Your Story:* How to identify each product's unique differentiators.<br>*4. Telling Your Story:* How to create presentations and leave-behinds that resonate.<br>*5. Measuring Effectiveness:* How to monitor interest in your products.<br>Lead Trainer: Hampton Harrison, *eVestment*<br>Coaches: Katie Jones & Pratik Naik, *eVestment* |
| 1:00pm-5:00pm<br>*Pittman Room* | ***Hands on Learning Lab for Investors** ****SESSION FULL****<br>**- Who Should Attend?**<br>Institutional Consultants, Chief Investment Officers, Manager Research Analysts, and anyone whose role touches portfolio strategy or asset allocation. Specifically, the workshop is designed for those who want to develop a deeper due-diligence process for screening managers, validating recommendations and monitoring their portfolios.<br>**- Lab Format:**<br>eVestment data experts will explain key concepts and provide customized guidance, while leading participants through case studies to apply what they're learning.<br>**- Curriculum:**<br>*1. Taking Advantage of Big Data*<br>*2. Screening Managers:* Narrow down search criteria while maintaining flexibility<br>*3. At-a-Glance Scoring:* How to create a dashboard view of your managers<br>*4. Portfolio Construction:* Optimize approach to asset allocation, evaluating decisions.<br>Lead Trainer: John Alexander, *eVestment*<br>Coaches: Alex Trogstad & Brandon Swanson, *eVestment* |

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| 2:00pm-5:00pm<br>*Chastain – Group 1*<br>*Boardroom – Group 2*<br>*Office 2 – Group 3* | ***Managers Finals Competition** ****SESSION FULL****<br>**What is it?**<br>Three groups will compete before a panel of judges to determine which group best uses data to tell the most compelling 10-minute story about their assigned product. Teams will have an eVestment coach to help identify data that would set their assigned product apart from the competition and a consultant "mentor" to provide input on what consultants are looking for from managers during finals presentations to ensure that presentations are on track.<br>**Who Should Participate?**<br>Professionals at an asset management firm with at least one long-only strategy. This is a great opportunity to get to know the consultant mentoring team and to showcase your strengths to the consultant judging panel.<br>**What is the Time Commitment?**<br>Participants must arrive and ready to meet by 2:00pm Wednesday, November 9th. You will be briefed a group then will break out into teams to start developing your strategy. A second block of time is set aside for the teams to prepare on Thursday from 4:30-6:00 pm.<br>**The Competition:**<br>eVestment coaches will have done extensive background work to familiarize themselves with the products and will provide the team with suggestions on how to position the strategy. Coaches will also show you how to get the data on your laptop. We will provide credentials for you to use that will grant access to our platform. You will have clear information about the investor who has invited you to the finals presentation. Your eVestment coach and consultant mentor will ensure that you are well-prepared.<br>**The Presentation:**<br>"Finals presentations" will be made on the main stage beginning at 8:05am Friday morning. Maximum of five slides and no more than 10 minutes to present per team. Members of the winning team will bask in the glory of winning and will have a donation made to the charity of their choice. No other prize is being offered.<br>**Consultant Mentors:**<br>Kelli Schrade, Director of Manager Research, Managing Partner, *Marquette Associates*<br>Michael Butkus, Generalist, Investment Analyst, *Atlanta Consulting Group*<br>Chris Kamykowski, SVP, Head of Traditional Manager Research, *Summit Strategies Group*<br>**Consultant Judges:**<br>Ryan Anderson, Senior Consultant, Director of Manager Research, *Pavilion Financial Corporation*<br>Keith Hocter, Partner & Consultant, *Bellwether Consulting*<br>Evan Scussel, CFA, Head of Traditional Investment Manager Due Diligence, *The Bogdahn Group* |
| 3:00pm-5:00pm<br>*Centennial Room* | ***Omni Client Networking** ****SESSION FULL****<br>**What is it?**<br>Join fellow Omni users for a structured networking session that will bring fellow peers together to learn from each other and the database team at eVestment. Topics include:<br>*1. Database Updating:* What is important to prioritize? So many fields, so little time.<br>*2. Holdings Issues:* What challenges are you facing?<br>*3. Strategies & Vehicles:* How much is too much? How many is not enough?<br>Lead Trainer: Jill Banaszak, *eVestment*<br>Coaches: Melanie Horvath, Shari Cruz, Sara Leckemby & Denise Corra, *eVestment* |
| 6:00pm-7:30pm | **Welcome Reception** |

# Thursday, November 10, 2016

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| 8:00am-4:45pm<br>*Ellington Prefunction* | **Innovation Lab**<br>*See our developers at work and influence the future of eVestment solutions!* |
| 8:00am- 4:45pm<br>*Ardmore Room* | **One-on-One Help Appointments**<br>*Schedule 30 minutes to receive personalized help and optimize your workflow.* |
| 8:00am-9:00am<br>*Ellington Prefunction* | **Networking Breakfast** |
| 9:00am-9:30am<br>*Ellington Ballroom* | **Welcome & Opening Keynote**<br>Jim Minnick, Co-Founder, *eVestment*<br>Matt Crisp, Co-Founder, *eVestment*<br>Heath Wilson, Co-Founder, *eVestment* |
| 9:30am-10:30am<br>*Ellington Ballroom* | **KEYNOTE: How to Pitch Anything**<br>Mr. Klaff takes his background as an investment banker to reveal strategies to pitch and win business by rethinking your presence, your story and your approach.<br>Oren has extensively studied how humans respond to each other in high-stakes business situations, and seeks to understand the different motivations and economic responses of the human mind, and how to use this in everyday business situations.<br>Oren Klaff, President & CEO, *Intersection Capital* and Author of best-selling book, "*Pitch Anything*" |
| 10:30am-10:45am<br>*Ellington Prefunction* | **Networking Break** |
| 10:45am-11:45am<br>*Ellington Ballroom* | **KEYNOTE: Behavioral Finance**<br>Mr. Crosby brings his extensive background in behavioral finance to eVestment clients as we consider how to manage investors, committees, boards and prospects who may respond emotionally to the latest performance results.<br>Daniel Crosby, PhD, President, *Nocturne Capital* and author of *"The Laws of Wealth: Psychology and the Secret to Investing Success"* |
| 11:45am-12:00pm | **Afternoon Announcements** |
| 12:00pm-1:00pm<br>*Overlook* | **Networking Lunch** |

## Breakout Sessions I:

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| 1:00pm-2:00pm<br>*Ellington ABC* | **Business Strategy & Marketing**<br>**"Competing Collaboratively to Meet Shifting Client Needs"**<br>Review the current operating environment, highlighting shifting trends in both institutional and retail client segments. Outlining key themes asset managers need to consider when developing distribution strategies that will meet client needs. Exploring five key strategies asset managers can employ to compete in an industry going through transformation. Discussing key themes that asset management leadership must address to win in tomorrow's investor landscape<br>Jeb Doggett, Managing Director, *Casey Quirk by Deloitte* |
| 1:00pm-2:00pm<br>*Mercer I* | **RFP / Database**<br>**"Data as a Foundation: Past, Present, & Future"**<br>Explore the past, present, and future of databases and asset manager marketing. What led us to where we're at, and how does that inform where we'll go?<br>Melanie Horvath, Senior Vice President, *eVestment*<br>Jeff Steinke, Product Strategist, *eVestment* |

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| 1:00pm-2:00pm<br>*Mercer H* | **Investors**<br>**"Private Equity: What Do Investors Really Think?"**<br>- The growth in private markets: what's behind it, future trends<br>- Do private markets outperform? Is it riskier & how do you assess performance?<br>- Fees: Are they too high, are they understood, do GPs clearly identify what is being charged?<br>- Co-investments: Are they a key part of a private markets strategy & how do you approach them? Is it only the worst deals that get offered?<br>- Adjacencies: PE Debt, Real Estate, Real Assets. What is alternative?<br>Brady Hyde, Portfolio Manager, Private Equity Investments, *UPS Group Trust*<br>Donna Smolens, Senior Advisor, *Insight Venture Partners*<br>Catharine Burkett, VP, Director of Private Investments, *LCG Associates*<br>Graeme Faulds, Director of Private Equity, *eVestment*<br>Chris Sparenberg, VP, Private Market Data, *eVestment* |
| 2:00pm-2:15pm<br>*Ellington Prefunction* | **Networking Break** |

## Breakout Sessions II:

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| 2:15pm-3:15pm<br>*Ellington ABC* | **Business Strategy & Marketing**<br>**"Global Events Impacts & Trends from a Macro-Level View: Brexit, Global Currency Impact, Global Elections"**<br>- Discussion of global events impacts brought about by political action, Brexit, and elections and the trends & historical data which lends to the current and future marketplace<br>- Impact of currency shifts and the reaction, where data is lending to distribution of assets globally<br>- The influence of active vs. passive approaches and what it means for the industry<br>Samuel LaNasa, Director, Global Investor Sales, *Citigroup Global Markets Inc.*<br>Peter Laurelli, Global Head of Research, *eVestment*<br>Charles Ashwanden, SVP, Global Account Management, *eVestment*<br>Tate Haymond, Senior Vice President, *eVestment* |
| 2:15pm-3:15pm<br>*Mercer I* | **RFP/Database**<br>**"How to Develop a Database Strategy, RFP Best Practices"**<br>- Gain insights on how industry peers tackle the never-ending responsibilities of RFP Teams<br>- Discuss best practices for building and managing an effective RFP team<br>- How to prioritize database updates and RFPs amongst resources<br>Wendy Hopewell, Manager, RFP Services, *Putnam Investments*<br>Brenda McGregor, BI & Marketing Analytics, *Principal Global Investors*<br>Jill Banaszak, Senior Vice President & Head of Omni Solutions, *eVestment* |
| 2:15pm-3:15pm<br>*Mercer H* | **Investors**<br>**"Making Cosmos from Chaos--The Struggle to Identify ESG Best Practice in the U.S."**<br>The topic of ESG investing remains mired in linguistic anarchy in the United States. This session will focus on providing a framework for constructive conversations with investors, managers and other industry participants and clearing up some of the popular misconceptions that slow progress towards sustainable investing.<br>Meredith Jones, Partner, Alternative Investment Consultant, *AON Hewitt*<br>Maria Simon, Marketing Manager & ESG Specialist, *eVestment* |

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| 3:15pm-3:30pm | **Networking Break** |
| 3:30pm-4:15pm<br>*Ellington Ballroom* | **KEYNOTE: Trends Briefing- The Obstacles and Opportunities to Thrive**<br>Let the data speak for itself. Showing the institutional demand. Discussion of hot topics such as active vs. passive and fees. Facing perceived opportunities & obstacles and the impact of manager size on flow. Tends on what lends to the characteristics of winners.<br>Michael Magnan, New Product Innovation, *eVestment*<br>John Molesphini, Senior Vice President, *eVestment* |
| 4:15pm-4:45pm<br>*Ellington Ballroom* | **KEYNOTE: How to Convey your Message**<br>The importance of analyzing your audience before developing your message. How information processes differently with everyone. How to strategically position your message as how it is transmitted and received by others.<br>Michele Shauf, PhD, Director of Corporate Learning, *eVestment* |
| 4:45pm-6:00pm | **Break** |
| 6:00pm-7:00pm<br>*Ellington Prefunction* | **Cocktail & Networking Reception** |
| 7:00pm-8:15pm<br>*Ellington Ballroom* | **Dinner & EI3 Awards Presentation**<br>The eVestment Awards recognize outstanding clients making best use of the eVestment platform. The awards are in four categories (Advantage, Agile, Ascent, Acumen) and recognize strategies and/or firms that excel beyond their peers in each category. The honorees are recognized every year at the annual EI3 conference. |
| 8:15pm-9:15pm<br>*Ellington Ballroom* | **Entertainment: The Capitol Steps**<br>Political Musical Comedy Group |

## Friday, November 11, 2016

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| 7:00am-11:50am<br>*Ellington Prefunction* | **Innovation Lab**<br>*See our developers at work and influence the future of eVestment solutions!* |
| 7:00am-11:30am<br>*Ardmore Room* | **One-on-One Help Appointments**<br>*Schedule 30 minutes to receive personalized help and optimize your workflow.* |
| 7:00am-8:00am<br>*Ellington Ballroom* | **Networking Breakfast** |
| 8:00am-8:05am<br>*Ellington Ballroom* | **Welcome** |
| 8:05am-9:15am<br>*Ellington Ballroom* | **Managers Finals Competition Presentations**<br>**Consultant Mentors to Introduce their Teams:**<br>Kelli Schrade, *Director of Manager Research & Managing Partner, Marquette Associates*<br>Michael Butkus, *Generalist, Investment Analyst, Atlanta Consulting Group*<br>Chris Kamykowski, *SVP, Head of Traditional Manager Research, Summit Strategies Group*<br>**Consultant Judges:**<br>Ryan Anderson, Senior Consultant, Director of Manager Research, *Pavilion Financial Corporation*<br>Keith Hocter, Partner & Consultant, *Bellwether Consulting*<br>Evan Scussel, CFA, Head of Traditional Investment Manager Due Diligence, *The Bogdahn Group* |
| 9:15am-9:30am | **Networking Break** |

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| 9:30am-10:30am<br>*Ellington Ballroom* | **KEYNOTE: Asset Allocation 20.20- Consultant Panel Interview**<br>- What will be the biggest change to investors' asset allocations over the next five years.<br>- Does this have a material impact on the consulting business?<br>- How do consultants account for the increased due diligence complexity?<br>- If the current asset allocation trends hold, what does this mean for long-only firms?<br>- What advice would you give asset managers to thrive in 2017?<br>**Consultants:**<br>Ryan Anderson, Senior Consultant, Director of Manager Research, *Pavilion Financial Corporation*<br>Keith Hocter, Partner & Consultant, *Bellwether Consulting*<br>Evan Scussel, CFA, Head of Traditional Investment Manager Due Diligence, *The Bogdahn Group*<br>**Moderator:**<br>- Sudheer Chava, PhD, Professor of Finance, *Georgia Institute of Technology* |
| 10:30am-10:45am | **Networking Break** |
| 10:45am-11:45am<br>*Ellington Ballroom* | **KEYNOTE: The Happy Secret to Better Work**<br>Mr. Achor offers insights from his extensive research on human potential and the connection between happiness and success. His Ted talk has been viewed over 13 million times. Let's explore the connection between happiness and thriving.<br>Shawn Achor, Co-Founder & CEO, *GoodThinkInc.* and Author of best-selling book *"The Happiness Advantage"* |
| 11:45am-11:50am | **Conference Wrap-up** |