AGENDA

POP-UP ROUNDTABLE

PORTFOLIO CONSTRUCTION & MODELS

APRIL 1 | BOSTON | HOSTED BY NATIXIS INVESTMENT MANAGERS

8:00 AM Registration & Continental Breakfast

8:30 AM **Welcoming Remarks & Introductions**

Joe Klimas, Senior Vice President, Portfolio Research & Consulting — Natixis Investment Managers

Tim Sullivan, Council Director — IMEA

9:00 AM **The Evolving Model Landscape**

Cerulli will highlight recent developments in the use of model portfolios in the advisor community and the most important considerations for traditional asset managers and 3rd party model providers from a product development perspective.

Brendan Powers, Associate Director, Product Development — Cerulli Associates

Scott Smith, Director, Advice Relationships — Cerulli Associates

9:45 AM Networking & Break

10:00 AM **Morningstar Perspective**

Morningstar discusses initiatives for the qualitative research, analysis and measurement of models.

Laura Lutton, Head of Asset Management Solutions — Morningstar, Inc.

10:45 AM **Distribution Partners Panel Discussion**

Join us for an interactive panel discussion focused on trends in model portfolio usage across the industry. You will hear from industry leaders about model adoption within their firms, how FAs are successfully incorporating models into their practice, and success factors for engaging Financial Advisors and Home Offices regarding model usage. Whether your firm is currently distributing model portfolios, or you are exploring model portfolio development, this session will provide you with actionable insights.

Moderator: **Scott Brady**, Vice President, Head of U.S. Product Development & Strategy — Columbia Threadneedle Investments

Steve Snyder, Senior Vice President, Investment Product Management — LPL Financial

Donna Castellano, Vice President, Investment Manager Relations — Envestnet

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11:45 AM Break & Box Lunch

12:15 PM **Executive Roundtable**

This intimate, interactive format will enable participants to candidly discuss their issues of interest and experiences. Identified topics for discussion include:

- How to Substantiate Model Performance/Value to Clients
- How do Firms Differentiate
- Educating Clients
- Tools & Tech
- The Advisor Perspective

3:00 PM Adjourn