



Portfolio Construction Roundtable

SEPTEMBER 21 | NEW YORK | HOSTED BY **Federated Hermes**

AGENDA THURSDAY, SEPTEMBER 21

8:30 AM	Registration & Continental Breakfast
9:00 AM	Welcome & Opening Remarks Kimber Lintz , Director <i>IMEA</i> Bud Person , Executive Vice President, Portfolio Construction Solutions <i>Federated Hermes</i> Participant Introductions
9:45 AM	Fuse Advisor Survey Highlights Mike Evans , Partner <i>FUSE Research Network</i> Mike will kick the day off sharing highlights of a FUSE/WealthMangaement.com advisor survey on asset allocation and portfolio construction. Results will help investment managers understand the views of a broad advisor population on issues including: <ul style="list-style-type: none">• Drivers of Change to a Client's Asset Allocation – financial advisor due diligence, models (home office and 3rd party), changes in client goals, market/economic outlook, etc.• Areas of improvement for Portfolio Construction Services• Effectiveness of sales specialists in closing business including PCS• Usage & Overall Views of Home-Office Models• How Advisors are Engaging with Asset Managers for Portfolio Construction Guidance<ul style="list-style-type: none">• First meeting preferences• Delivery of results• Update frequency• Expected and actual turnaround time
10:30 AM	Break
10:45 AM	Client Consultations: Sharing Best Practices and Processes Moderator: Joe Klimas , Senior Vice President <i>Natixis Investment Management Solutions</i> This interactive discussion will explore approaches teams take when engaging with clients and share what they perceive as their distinct strengths, differentiators, and competitive advantages in terms of portfolio construction/consultative approach and value proposition. <i>Please be prepared to participate.</i>
11:45 AM	Lunch
12:15 PM	Executive Roundtable This candid, interactive conversation will provide a unique forum for Portfolio Construction leaders to take deep dives into top-of-mind issues in this critical business area. Discussion topics include: <ul style="list-style-type: none">• Technology & Analytical Tools• Data• Team Structure• Models/Multi-Asset Solutions
2:00 PM	Adjourn