

Manager Analysis Services Presentations
THOUGHT LEADERSHIP - INDUSTRY SPEAKING ENGAGEMENTS

SPONSOR	EVENT	ROLE	TOPIC	DATE	SPEAKER
UPCOMING PRESENTATIONS					
Opal Group	Emerging Managers' Summit	Panelist	Marketing to Family Offices: Mistakes Managers Make	09/2019	Donahoe
IMI	Emerging and Diverse Manager Summit	Speaker	Managing Risk in a Complex Universe	9/2019	Cutler
IMI	OCIO Solutions Summit	Speaker	Screening and Selecting the Best OCIO Providers	10/2019	Donahoe
PI Online	First Annual OCIO Conference	Attendee	First Annual Pension Investment Online OCIO	10/2019	Donahoe
Opal Group	Endowment and Foundation Forum '19	Speaker	Examining the Benefits of Investment Outsourcing	11/2019	Donahoe
CFA - NY	4th Annual Performance and Risk Forum	Panelist	Key Insights into Hiring and Firing Fund Managers	11/2019	Donahoe
IMI	Consultants Congress	Panelist	The Role of Alternatives in Tomorrow's Portfolios	11/2019	Cutler
Insight Exch	ESG Due Diligence and Analytics Summit	Panelist	Due Diligence Implications for Climate Related ESG Investments	1/2020	Donahoe

PAST PRESENTATIONS SEE BELOW ON NEXT PAGE

SPONSOR	EVENT	ROLE	TOPIC	DATE	SPEAKER
IMI	OCIO Solutions Summit	Panelist Speaker	Drafting OCIO Agreements for Tomorrow Screening for the Best "Fit" OCIO Providers	06/2019	Donahoe
FRA LLC	5th Annual Responsible Investing Summit	Roundtable	Achieving Fossil-Free and Climate Action Goals - Governance Hurdles	04/2019	Donahoe
FRA LLC	8th Annual Investment Outsourcing	Panelist	Defining Fiduciary Duty - Practical Steps to Good Governance	03/2019	Donahoe
FRA LLC	8th Annual Investment Outsourcing	Panelist	Services an OCIO Can Provide Beyond Investing	03/2019	Donahoe
IMI	OCIO Solutions Summit	Panelist	Risk Management and Investor Suitability for OCIO strategies	11/2018	Cutler
Opal Group	Endowment and Foundation Forum '18	Speaker	Examining Risk Measurement to Risk Management	11/2018	Donahoe
IMI	Emerging Managers' Summit	Roundtable	Challenges in selecting emerging managers	11/2018	Cutler
IMI	Consultants' Retreat	Speaker	Role of Alternatives in Tomorrow's Portfolios	09/2018	Donahoe
IMI	Alternative Investment Consultants' Congress	Panelist	Business trends at alternative investment managers	9/2018	Cutler
Block Seoul	BlockSeoul	Panelist	"Securities Token Offerings" as the next evolutionary step in blockchain technology	9/2018	Cutler
CFANY	Volunteers' Reception	Speaker	Present to financial analyst community on accomplishments of premier volunteers	9/2018	Cutler
CFANY	Video Presentation	Speaker	Speak about accomplishments and vision for CFANY, in recording for global CFA community	7/2018	Cutler
IMI	OCIO Solutions Summit	Panelist	Why Institutions Are Embracing OCIO Structures?	06/2018	Donahoe
IMN	IMN Real Estate Summit	Panelist	Discuss data needs for managers for real estate strategies	6/2018	Cutler
Yale	Endowment Institute Commonfund	Attendee	5 day Conference. Key Challenges for Foundations & Endowments, Daily Case Studies, Senior member.	06/2018	Donahoe
CFA	Society Leaders' Conference in Hong Kong	Speaker	Advocate for updated governance practices at CFA Institute; coordinate meetings among XL Society leaders	5/2018	Cutler
IMI	Consultants' Congress--Chicago	Panelist	Consultants' growing role in the OCIO market	4/2018	Cutler
FRA LLC	7th Annual Investment Outsourcing	Moderator	OCIO Search and Selection - It's not one size fits all!	03/2018	Donahoe
FRA LLC	7th Annual Investment Outsourcing	Panelist	Fiduciary Responsibilities and Improving Governance Under an OCIO Structure	03/2018	Donahoe
FRA	Annual Investors' Outsourcing Congress	Speaker	Describe trends and issues with endowments' outsourcing investment management to consultants	3/2018	Cutler
IMI	Consultants' Retreat--San Francisco	Panelist	Developments in consultants' selection of investment managers	2/2018	Cutler
CFAHK	Inaugural Asset Owners' Series Event in Hong Kong	Speaker	Introduce the globally renowned Asset Owners' Series to the Hong Kong Society of CFA analysts	1/2018	Cutler
Opal Group	Endowment and Foundation Forum	Panelist	Guidelines for Effective Governance	11/2017	Donahoe