



FINANCIAL TECHNOLOGIES FORUM LLC

## Performance Measurement Conference

Bayards, One Hanover Square, New York

February 28, 2008

### 9:00 Chairperson's Opening Remarks

**Ron Olmstead**, *President,*  
*Olmstead Associates*

### 9:15 Keynote Address – Standards Update

**Arin Stancil**, *CFA, CIPM,*  
*Ashland Partners*

### 9:45 Impact of Alternative Investments

Moderator:

**Philip Sindel**, *Director*  
*Olmstead Associates, Inc.*

Panelists:

**Tanya Amaya**, *Assistant Vice President, Depository Receipts,*  
*The Bank of New York*

**J. R. Rieger**, *Vice President, Fixed Income Indices,*  
*Standard & Poor's Portfolio Services*

**Robert Caporale**, *Managing Director,*  
*Global Head of JP Morgan Hedge Fund Services and Private Equity Fund Services,*  
*JP Morgan*

### 10:30 Refreshment Break with Exhibitors

### 10:45 Fixed Income Attribution

Speakers:

**Patrick Farrell**,  
*QED Financial Systems, Inc.*

**Stephen Campisi**,  
*Bank of America*

### 11:30 Vendor Application Status

Panelists:

**Mark Elliot**,  
*SS&C Technologies*

**Barb Schmidt**, *Product Manager- Performance Measurement,*  
*InvestEdge*

**Rich Adams**, *Director, Product Management,*  
*CheckFree- now part of Fiserv*

### 12:30 Luncheon with Exhibitors



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1:30 **Broker Customer Reporting**

Moderator:

**Adam Armstrong,**  
*Olmstead Associates*

Panelists:

**Craig Heatter,** *Head of Performance Measurement, Analytics,  
Compliance and Risk Management Group  
JP Morgan Worldwide Securities*  
**Amr Mohamed,** *Chief Technology Officer,  
Merlin Securities*

2:15 **Money Weighted vs. Time Weighted**

Speakers:

**Cecelia Wong,** *President,  
Base Two Investments*  
**Kristina Fernandes,** *Vice President,  
Fidelity Investments*

3:00 *Refreshment Break with Exhibitors*

3:15 **Technology Implementation: Success and Pitfalls**

Moderator:

**Denise Valentine,** *Senior Analyst,  
Aite Group*

Panelists:

**Mark R. David,** *CFA, President,  
Essex River Analytics*  
**Michael Tropeano,**  
*State Street*  
**Steve Riordan,** *CEO  
Stanford Eagle*

4:00 **Managing Data**

Speakers:

**Peter Poulin,** *Managing Director,  
BBH*  
**Gordon Wan,**  
*BBH*