This unique one-day learning event assembles a group of leading investment consultants and top-notch experts with the latest know-how and fresh insight you need to take your work with RFPs to the next level. In this workshop-style setting, you will get the answers to all of your questions about how to maximize the effectiveness of your proposals and put your firm in the best possible position to win!

APRIL 29, 2016              THE PRINCETON CLUB, NEW YORK

VALUABLE TAKEAWAYS

• Hear directly from prominent investment consultants about how they see the proposals you submit
• Investigate the latest strategies for effective proposal design and structure
• Learn how to leverage the most powerful persuasive writing techniques
• Get answers from the investors panel to your specific questions
• Find out the six essential steps for end-to-end RFP project management
• See how to turn words, numbers and ideas into graphics that maximize the impact of your proposal
• Hear about the most effective strategies for optimally updating multiple databases
• Understand the questions behind the questions on a DDQ
• Learn how to collaborate more effectively with partners across your firm to complete RFPs
• Get the latest strategies for saving time and money in proposal creation without reducing effectiveness
• Investigate the new ways database searches are being used in tandem with RFPs

LAST YEAR’S ATTENDEES SAID:

“A concise presentation of RFP concepts brought into the 21st century.”
Mark Kalafsky, Enterprise Iron

“A comprehensive overview that will materially assist in our future RFP efforts!”
Hilary Gray, Alpha Simplex Group

“Great information that I can start using now.”
Bethany Murphy, Holland Capital Management

“Excellent— Quality of experienced speakers, content, presentations, resources.”
Carolyn Foster, Eaton Vance

“Very specific to my job and questions I have on various topics.”
Andrea Mullins, Artisan Partners

“Great insight and speakers.”
Emily Pope, Institutional Sales Supervisor
VANGUARD

“Great conference for someone entering the RFP world. Provided ‘real time’ tips and tricks of the industry.”
Aaron Kroll, VP of Capital Markets
LINGERFELT COMMONWEALTH

TO REGISTER: CALL 800-280-8440 OR VISIT US AT WWW.FRALLC.COM
This intensive, one-day learning event is the pit stop you need to fine-tune and update your proposal and consultant database skills and maximize your win rate. We are building on the success of the 2015 Boot Camps in New York and Boston with an enhanced version for 2016, giving you more time to hear directly from investment consultants (and ask them your questions), as well as the latest insights and leading-edge innovations from industry experts on our speaking faculty.

Get the latest techniques for creating winning proposals and database updates, including developing a success strategy guaranteed to highlight your firm’s unique strengths, as well as leveraging the most powerful persuasive writing tactics. Learn how to make your proposal so visually compelling that it commands attention. We haven’t left out the often-overlooked key to success in creating proposals: project management skills are laid out in six simple steps.

In our unique, workshop-style environment, full of interactive exercises and activities, industry leaders will share their secrets for maximizing the effectiveness of proposals and database updates. Join us for a day and put your firm in the best possible position to win!

TOP REASONS TO ATTEND:
• Hear directly from investment consultants on how to maximize your win rate
• Study the most effective persuasive writing techniques
• Review the steps to creating a winning proposal strategy
• Understand the new ways in which investors are using consultant databases in tandem with RFPs
• Learn how to develop persuasive responses to questions typically asked in a DDQ
• Understand how to anticipate potential obstacles to success
• Focus on creating a culture of collaboration on RFPs in your firm
• Analyze how to make your proposal visually more impactful than the competition
• Gain new insight into saving time and money in the proposal development process
• And much more...

Register today!
Call 800-280-8440 or online at www.frallc.com.

Sincerely,

Lance Lysinger
Lance Lysinger, Conference Director
FINANCIAL RESEARCH ASSOCIATES

P.S. Come with lots of questions—this unique, interactive event is designed to facilitate communication with the experts!
**WHO SHOULD ATTEND?**

- Proposal Writers
- RFP/Consultant Database Team Members and Managers
- Marketing Directors and Associates
- Business Development Managers
- Consultant Relations Professionals
- Business Communication Specialists
- Managers of Sales Teams
- Client Service Specialists

**SPONSORSHIP AND EXHIBIT OPPORTUNITIES**

Enhance your marketing efforts through sponsoring a special event or exhibiting your product at this event. We can design custom sponsorship packages tailored to your marketing needs, such as a cocktail reception or a custom-designed networking event.

To learn more about sponsorship opportunities, please contact Menna Lloyd White at 704-341-2440 or mlloydwhite@frallc.com

---

**GET ANSWERS TO THESE IMPORTANT QUESTIONS**

- What are the red flags that consultants look for in a proposal?
- What role do proposals play in the selling cycle?
- How do I select the best opportunities to pursue?
- What is involved in developing an overall strategy for my proposal?
- Which facts are most important to highlight in DDQ responses?
- How do I guarantee uniformity of information and messaging between my proposals and my consultant database updates?
- How can visual elements enhance the effectiveness of my proposal?
- Which project management strategies can maximize my efficiency with proposals?
- How can I be ready for the most common questions typically asked in an RFP?

---

**CPE CREDITS**

Financial Research Associates is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

The recommended CPE credit for this course is 8.5 credits in the following field(s) of study: Finance

For more information, visit our website: www.frallc.com/thefineprint.aspx

---

**OFFICIAL PUBLICATION AND MEDIA PARTNER**

---

**REPRESENTATIVES FROM THESE COMPANIES BENEFITED FROM BY ATTENDING LAST YEARS’ RFP BOOT CAMP EVENTS**

Acadian Asset Management LLC
Alesco Advisors LLC
Alinda Capital Partners
Allianz Global Investors
ALPHA SIMPLEX GROUP
Ameritas Investment Partners
Artisan Partners
Aurora Investment Management L.L.C.
Baron Capital
BNY Mellon
Boston Partners
Brandes Investment Partners
Bridgewater Associates
Brightwood Capital Advisors
Brinker Capital
Calvert Investments
CAPTRUST
Charles Schwab
Copeland Capital Management
Cutler Investment Group, LLC
Daruma Capital Management LLC
Davenport Asset Management
DFM
Diamond Hill Capital Management, Inc.
DoubleLine Capital
Eaton Vance Management
Enterprise Iron
Fidelity Investments
Fifth Third Bank
Fitch Ratings, Inc.
Franklin Templeton Investments
Garcia Hamilton & Associates
Geneva Advisors
GoldenTree
Hamilton Lane
Harbourvest Partners
Harris Associates
Hartford Investment Management Company
Highland Capital Management
Holland Capital Management LLC
IVA Funds
John Hancock Investments
Johnson Investment Counsel
Loomis, Sayles & Company
Lord Abbett
Los Angeles Capital Management and Equity Research Inc.
MAI Capital
MassMutual
McKinley Capital Management, LLC
MFS Investment Management
Motley Fool Asset Management
National Real Estate Advisors
Natixis Global Asset Management
New York Life Investments
Northern Lights Capital Group
OppenheimerFunds
Palisade Capital Management, L.L.C.
PFM Asset Management LLC
PineBridge Investments
Pioneer Investments
Prudential Fixed Income
Punch and Associates
Renaissance Investment Management
Schafer Cullen Capital Management
Schroders
Seismic
Spark Investment Management LLC
Sterling Capital Management, LLC
Sustainable Insight Capital Management
Taconic Capital Advisors LP
Thornburg Investment Management
Tocqueville Asset Management
TORREYCOVE CAPITAL PARTNERS
Towers Watson
Tributary Capital Management
Virtus Investment Partners Inc.
Voya Investment Management
Weitz Investment Management, Inc.
Wellington Management Company
OUR SPEAKING FACULTY

B.J. Lownie
PPF APMP, Principal, Managing Director
STRATEGIC PROPOSALS

With more than thirty years’ experience in the proposal arena, B.J. is a recognized thought leader in proposal development. He is the co-author (with Jon Williams) of the recently published Proposal Essentials: Win More Win More Easily. B.J is a founding member, an accredited Professional and elected Fellow of the Association of Proposal Management Professionals (APMP). Also with Williams, B.J. is the co-author of the long-running and very popular proposal blog, “The Proposal Guys” (www.theproposalguys.com).

David Eisenberg
Partner, Director of Client Consulting, North America
MERCER

David is Mercer’s North America Director of Client Consulting, and the segment leader responsible for leading Mercer’s investment services to U.S. wealth management providers. He is a partner, based in Mercer’s Boston office. As Director of Client Consulting, David shares overall responsibility for the leadership and development of the value that Mercer brings to their clients in the defined benefit, defined contribution, and wealth management segments. He is also responsible for oversight and development of Mercer’s Responsible Investment and Mercer Sentinel specialty units. David holds an MBA from Harvard Business School.

Hilary Wiek
CFA, CAIA, Vice President, Alpha Investment Research, Head of Global Equity
SEGAL ROGERSCASEY

Hilary is a Vice President in Segal Rogerscasey’s Darien office with over 20 years of experience in the investment industry, including direct private and public equity manager research. She is the Head of Global Equity and a member of the Alpha Investment Research Group, which is responsible for Fundamental/Quantitative Manager Research. Prior to joining Segal Rogerscasey, Hilary was the Director of Public and Private Equity for the South Carolina Retirement System Investment Commission. She holds an MBA in Finance and Economics from Case Western Reserve University’s Weatherhead School of Management.

Bill O’Donnell
Senior Managing Director, Multi-Employer Plans
ALAN D. BILLER & ASSOCIATES

Bill joined Alan D. Biller & Associates with over 25 years’ experience in institutional pension consulting and portfolio management. He is the lead consultant for defined benefit, defined contribution, and multi-employer plans. Prior to joining the firm he was Senior Consultant in the Tart-Hartley Practice Group at NEPC. He has also held positions as Managing Director at Endurance Capital, Managing Partner at Vision Global/Fursa Alternatives and Portfolio Strategist at The Boston Company. He holds the Certified Hedge Fund Professional (CHP) designation. Bill holds a BA from the University of Massachusetts Boston and an MBA from Suffolk University.

Diana Merenda
Managing Director
CLIENT LIFECYCLE SOLUTIONS

A recognized process improvement expert in the areas of client service, marketing distribution and RFP support, Diana has extensive experience at major Wall Street firms including as RFP Team Manager at Lazard Asset Management. Diana is co-founder of Client Lifecycle Solutions LLC, a financial services consultancy, and is an Adjunct Professor teaching Services Operations Management at CUNY’s Baruch College. She has authored white papers and articles for the National Society of Compliance Professionals (NSCP), FUNDfire and Smart Business and serves on the Financial Women Association’s Leadership Council. Diana holds an MBA from Baruch College.

Susan Benedetto
Director
INVESTMENT METRICS

Susan is a Director and Product Manager with Investment Metrics, LLC (invmetrics.com), where she focuses on content strategy, planning and development. Prior to joining Investment Metrics in 2010, she spent 16 years with Rogerscasey (now Segal Rogerscasey) as product manager for the firm’s data and research platforms, and led the performance measurement, client reporting and manager database groups. Prior to Rogerscasey, she specialized in business development and client service for the insurance industry. Susan is a member of Women in Pensions Network and earned her bachelor’s degree from the University of Connecticut.

Anne M. Farro
Director, Head of Business Management - Institutional North America
ALLIANZ GLOBAL INVESTORS

Anne Farro joined Allianz Global Investors in October 2012 as Head of Business Management, North America Institutional. Anne previously worked for HSBC Global Asset Management where she developed a fully integrated marketing strategy for their US Institutional business. Over the course of her career, Anne has held marketing and RFP roles with increasing responsibility at Thomson Investor Services, Bankers Trust, Deutsche Asset Management and Bear Stearns Asset Management. She began her career at Kidder, Peabody & Co. Anne is a certified Six Sigma Green Belt and a member of the Professional Association for Investment Communications Resources (PAICR). She holds a Bachelor of Arts degree in Human Resource Management from Upsala College.

Colleen Jolly
CPP APMP Fellow, Principal
24 HOUR COMPANY

Colleen, a 16+ year proposal veteran, previously served as CEO of the international board of the Association of Proposal Management Professionals and is a frequent worldwide speaker and writer on creative and general business topics. She is the winner of the 2012 APMP Insight Award. As a principal of the 24 Hour Company, she manages a global professional proposal graphic company which has been named one of Inc.5,000’s Fast Growing Companies three times.
# Creating High-Impact RFPs

In order to draw up a blueprint for success, we must first understand the elements of the proposal that make it such a powerful tool for gaining new business. After scrutinizing each of these, B.J. reveals how to determine the most effective overall strategy for your proposal and put your firm in the best possible position to win.

- Understanding proposals within the selling cycle
- Proposal development roles and responsibilities
- Optimizing the proposal development process
- Qualifying and selecting the best opportunities to pursue
- Strategy development for compelling proposals

B.J. Lownie, CPP APMP, Fellow, Principal, Managing Director

---

## 10:10 – 10:10 MORNINGS BREAK

---

## 10:10 – 11:30 WORKSHOP: CREATING HIGH-IMPACT, HIGH-SCORING PROPOSAL CONTENT

In this interactive setting replete with concrete takeaways and hands-on exercises, B.J. teaches you the powerful persuasive writing skills you will need to create winning proposals and database updates.

- Proposal planning/management
- Effective proposal design and structure
- The content development process
- Developing powerful executive summaries
- Creating high scoring responses to questions

B.J. Lownie, CPP APMP, Fellow, Principal, Managing Director

---

## 11:30 – 12:30 CONSULTANT SPOTLIGHT

### ANALYZING A SPECIFIC RFP AS AN EXAMPLE, MERCER’S DIRECTOR OF CLIENT CONSULTING FOR NORTH AMERICA REVEALS:

- Which questions should receive your special attention
- Which points constitute a potential pitfall
- How you can highlight your firm’s unique strengths through your responses
- An inside view of how his firm conducts the manager search/selection process

David Eisenberg, Partner, Director of Client Consulting, North America

---

## 12:30 – 1:30 LUNCHEON FOR ALL ATTENDEES AND SPEAKERS

---

## 1:30 – 3:00 WORKSHOP: CONSULTANTS ANSWER YOUR QUESTIONS

In this interactive session, consultants will answer questions posed by attendees. (If you would like to give the panelists extra time to consider your questions, please submit them beforehand to conference producer Lance Lysinger at lysinger@frallc.com before April 19, 2016.) The experts respond to your questions, including:

- What are the red flags they look for in a proposal?
- What can a boutique or emerging manager do to get their attention?
- What are the latest ways consultants use databases in tandem with RFPs?
- Which are the biggest pitfalls in responding to a DDQ?
- How can you be sure your proposal gets extra consideration?

---

## Speakers

- **Diana Merenda**, Managing Director, Client Lifecycle Solutions
- **Hilary Wiek**, CFA, CAIA, Vice President, Alpha Investment Research, Head of Global Equity
- **Bill O’Donnell**, Senior Managing Director, Multi-Employer Plans

## 3:00 – 3:10 AFTERNOON BREAK

## 3:10 – 3:50 ENSURING MAXIMUM EFFECTIVENESS OF DATABASE UPDATES IN THE NEW WORLD OF SHADOW SEARCHES

- Understanding the relationship between your data and those who are looking at it
- Identifying key requirements
- Developing a content strategy for maximum effectiveness

Susan Benedetto, Director

## 3:50 – 4:45 MASTER CLASS: SIX STEPS TO EFFECTIVE PROJECT MANAGEMENT IN CREATING SUCCESSFUL PROPOSALS

Many experts maintain that project management skill is just as important as writing in creating an effective proposal. In this intensive classroom setting, we spell out the steps to success including:

- Focusing on the essential steps for ‘end-to-end’ RFP management
- Creating a culture of upfront collaboration and transparency
- Working with partners across the firm to effectively complete RFPs
- Ensuring the tools to underpin process efficiency

## 4:45 – 5:30 LEVERAGING GRAPHIC ELEMENTS TO MAXIMIZE YOUR PROPOSAL’S EFFECTIVENESS

- Turning words, numbers and ideas into graphics that win
- Analyzing examples of winning (and losing) graphics
- Understanding when to use a graphic-- and when not to
- Learn proposal secrets that increase the likelihood of winning by 43%
- Tips, tricks and tools to save money and time on your next proposal

Colleen Jolly, CPP APMP, Fellow, Principal

## 5:30 EVENT ADJOURNS

---

**THE CONFERENCE ORGANIZER**

Financial Research Associates provides the financial community with access to business information and networking opportunities. Offering highly targeted conferences, FRA is a preferred resource for executives and managers seeking cutting-edge information on the next wave of business opportunities. Please visit [www.frallc.com](http://www.frallc.com) for more information on upcoming events.
Maximize Your Win Rate with an Intensive Update in the Latest Proposal Writing and Consultant Database Skills

FINANCIAL RESEARCH ASSOCIATES PRESENTS THE

RFP BOOT CAMP FOR ASSET MANAGERS

Maximize Your Win Rate with an Intensive Update in the Latest Proposal Writing and Consultant Database Skills

APRIL 29, 2016

THE PRINCETON CLUB, NEW YORK

FINANCIAL RESEARCH ASSOCIATES
200 WASHINGTON ST. SUITE 201
SANTA CRUZ, CA 95060

ATTENTION MAILROOM:
If undeliverable, please forward to the RFP Director.

CONFERENCE CODE: B1012

CONFERENCE CODE: B1012

STANDARD CONFERENCE

$1195

Name ___________________ Title ___________________
Company ___________________
Address ___________________
City ___________________ State _____ Zip ______
Phone ___________ Email ______

INCORRECT MAILING INFORMATION: If you are receiving multiple mailings, have updated information or would like to be removed from our database, please fax our database team at 704-341-2641 or call 704-341-2387. Please keep in mind that amendments can take up to 8 weeks.

Payment Method:
Payments must be received no later than April 22, 2016

Please bill my:  □ MC  □ VISA  □ AMEX  □ DISCOVER

Card Holder's Name: ________________________________
Exp. Date: ______ / ______
Signature: ____________________________

Check enclosed: □  Please bill me later: □

Payments must be received no later than April 22, 2016

Make checks payable to Wilmington FRA, and write B1012 on your check.

Conference Code: B1012

Four Ways to Register

Fax  704-341-2641
Call  800-280-8440
Web www.frallc.com
Mail FRA
200 Washington Street, Ste. 201
Santa Cruz, CA 95060

Please Mention This Priority Code When Registering