



EXECUTIVE FORUM ON ONLINE MARKETING & DISTRIBUTION AGENDA

THURSDAY, APRIL 30, 2009

SPONSORED BY:

12:00 PM **REGISTRATION & BOX LUNCH**

1:00 PM **WELCOME**

Martha Sabin, Client Relations Manager–
Boston Financial Data Services



INTRODUCTIONS & OPENING REMARKS

Ted Stauderman, Director, Marketing Services & E-Commerce–Calvert
Electronic Commerce Council Steering Committee Chairman–MFEA

1:15 PM **PERSPECTIVES ON GROWTH IN 2009**

Anurag Heda, Senior Managing Consultant–kasina

In the last six months, asset management executives saw grey hair increase as AUM decreased. During this time, kasina monitored, observed and recognized asset management trends—some beneficial and others not. This session will discuss the changing roles of Sales, National Accounts, Marketing and E-Business in 2009 and beyond. Additionally, kasina will provide insights and trends on how firms are running business as usual in this unusual time.

2:15 PM **PUTTING THE ADVISOR BACK INTO ADVISOR WEBSITES**

Lucy Zachman, Director of Customer Experience and Creative, eBusiness–
OppenheimerFunds

- ◆ Do you hear what I hear (are you listening to your advisors)?
- ◆ Think outside in (not inside out)
- ◆ Help advisors help themselves
- ◆ Projects vs. user experience
- ◆ The next big thing(s)

Learn what OppenheimerFunds has done to understand their users and to reflect and serve their needs (not just marketing!) in the websites. Plus, we'll talk about how to plan and execute on a long-term, user-driven strategy to ensure you stay ahead of the curve.

3:00 PM **TAKE A BREAK**

Refreshments and Cell Phones

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- 3:15 PM **THE EVOLUTION OF INTERMEDIARY DISTRIBUTION—EFFECTIVELY MANAGING & COMMUNICATING TO MULTI-CHANNEL GATEKEEPERS DURING FINANCIAL TURMOIL**
Peter J. Moran, Managing Partner—DundeeWealth US, LP
- ♦ The Macro View—Trends in mutual fund cash flow and product development
 - ♦ The Investor Perspective—Is 2009-2010 the mirror image of 1999-2000?
 - ♦ The New Service & Communication Program—Has the pendulum swung the other way?
 - ♦ E-Wholesaling, Field Source Restructuring, National Accounts—What strategy will have the biggest payoff?
 - ♦ Looking Into the Crystal Ball—The Convergence of distribution, communication and product innovation
- 4:00 PM **EXECUTIVE ROUNDTABLE**
The Roundtable provides members with the opportunity to share their own experiences and perspectives and react to a variety of issues raised during the presentations. Candid, private and casual, members exchange approaches and gain insight in this unique forum.
- 5:00 PM **ADJOURNMENT**
- 6:30 PM **DINNER RECEPTION**
Tambien Cantina
Connect with other other online marketing and distribution executives for food, fun and lively conversation.
- FRIDAY, MAY 1, 2009**
- 8:00 AM **CONTINENTAL BREAKFAST**
- 8:30 AM **HOW FINANCIAL SERVICES WEBSITES ARE RESPONDING TO MARKET MAYHEM**
Kathleen Whalen, Principal & Managing Director—Dalbar, Inc.
Beginning last year and carrying into 2009, we are experiencing what many experts are calling the most significant downturn in our economy since the Great Depression. This crisis is leaving investors struggling to cope and financial professionals grappling with how to retain business and calm client fears. Dalbar will provide insight on how financial services firm websites are being used to allay these fears and what tools and resources are being made available to navigate through this financial storm.

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- 9:15 AM **PANEL: LEVERAGING THE WEB TO SUPPORT YOUR ADVISORS**
Moderator: Mike Ellison, Executive Vice President–Corporate Insight
Panelist: Philip Parrotta, Director, Head of Marketing–DWS Investments
In this market environment, communication is not only key—it’s everything. Advisors are spending more time on the phone with their clients and they need the tools, knowledge and support from the fund companies to deliver the right message. Find out how leading firms are using their advisor sites to support advisors in this effort.
- 10:00 AM **TAKE A BREAK**
Refreshments and Cell Phones
- 10:15 AM **ROUNDTABLE BREAKOUT SESSIONS**
Share your experiences, perspectives and ideas with other members during one of the eCC’s most popular sessions. This interactive discussion will be organized around several topics where small groups can discuss the challenges, opportunities and best practices on a variety of timely issues.
- 11:30 AM **LUNCH & ROUNDTABLE SUMMARY PRESENTATIONS**
- 1:00 PM **ADJOURNMENT**