

2010 eCC SUMMIT • APRIL 27-28, 2010 SHERATON HOTEL & TOWERS • NEW YORK, NEW YORK



AGENDA

The **MFEA eCC Summit** is designed for senior executives and managers involved in strategic planning, execution and management in areas of websites, digital marketing and online communications and distribution. An examination of eCommerce in the mutual fund industry and its most strategic considerations, the eCC Summit provides a vital forum for the exchange of perspectives on the key issues eCommerce fund executives must address to position their firms for growth and success.

TUESDAY, APRIL 27

6:30 - 8:30 pm **Dinner Reception**
Rosie O'Grady's, 800 7th Avenue, New York, NY

WEDNESDAY, APRIL 28

8:00 am **Continental Breakfast**

8:30 am **WELCOME**

Martha Sabin, Client Relations Manager—Boston Financial Data Services
eCC Summit & Council Co-Sponsor



INTRODUCTIONS & OPENING REMARKS

Ted Stauderman, Director, Marketing Services & E-Commerce—Calvert
eCC Steering Committee Chairman—MFEA

9:00 am **2010 & BEYOND—INTERFACING INTERMEDIARY DISTRIBUTION & E-DISTRIBUTION INITIATIVES**

Peter J. Moran, Managing Partner—DundeeWealth US, LP

- Implications of PIMCO's New Normal
- Wholesaling vs. Whole Servicing
- Leveraging Technology for Client Segmentation Effectiveness
- Do Conferences Work?
- The Rise of Outcome Based Solutions

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AGENDA

- 9:45 am Take a Break
Refreshments & Cell Phones
- 10:00 am **ONLINE MUTUAL FUNDS: PROSPECT BEHAVIOR, CUSTOMER PROFILES & USING WEB OPTIMIZATION TO DELIVER BETTER CUSTOMER EXPERIENCES**
Michael Krypel, Senior Director—Omniure Digital, an Adobe Company
Marc Trudeau, Senior Director—comScore
Mr. Trudeau will provide consumer research enabling firms to better understand the consumer shopping process surrounding mutual fund products. Results of comScore analysis will outline where mutual fund shoppers go to research products and what content they engage in at the company's website before opening an account. Mr. Krypel will discuss how to leverage what you know about your visitors to create richer, more engaging experiences for great profit. Learn how to start with your analytics data to understand your customers' needs and generate the hypotheses to test what makes your sites convert.
- 10:45 am **FINRA SOCIAL MEDIA & ADVERTISING REGULATION**
Joseph E. Price, Senior Vice President, Corporate Financing/Advertising Regulation—
Financial Industry Regulatory Authority
FINRA's foremost expert on social media and online advertising regulations will review current and recently released fund company guidelines.

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AGENDA

- 11:30 pm **LUNCH PRESENTATION: SUCCESSFUL WEBSITE STRATEGIES—HOW TO INCREASE CONVERSIONS & OPTIMIZE LANDING PAGES**
Patrick Bieser, President, Founder & CEO—Northwoods Software
This workshop will present insights into **web user psychology**, how to think about and **write for the web**, how to identify common content mistakes, and how writing for the web will improve your search engine rankings. Mr. Bieser couples his 15 years of web experience with his research of the most successful sites on the Internet today into a provocative presentation on how to create a usable and content-intelligent website.
- 12:45 pm **ONLINE HABITS OF ADVISERS: WHAT THEY LOOK FOR & WHY THEY GO ONLINE**
Evan Cooper, Deputy Editor—InvestmentNews
Suzanne Siracuse, Vice President—Crain Communications, Inc./Publisher—InvestmentNews
Data, survey results and feedback from advisers will tell you why they go online, where they go and how to best get their attention.
- 1:30 pm **MFEA ROUNDTABLE**
Fund company members of the MFEA and invited guests engage in an open Roundtable discussion. Each firm is asked to briefly comment on their own important annual goals and/or key issues impacting their business.
- 3:00 pm **Adjournment**