



eCC FORUM AGENDA

The **MFEA eCC Executive Council Forum** is designed for senior executives and managers involved in strategic planning and execution of e-business strategies. This event provides a vital Forum for the exchange of ideas and candid conversation on key issues and topics.

THURSDAY, OCTOBER 21

THE MID-AMERICA CLUB, CHICAGO

8:00 am **Registration & Continental Breakfast**

8:30 am **WELCOME & OPENING REMARKS**

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

8:45 am **MORNINGSTAR METHODOLOGIES AND THE RESEARCH BEHIND THEM**

Mary Karen Dolan, CFA, Director, Mutual Fund Analysis—Morningstar, Inc.

Financial advisors and individual investors know Morningstar's Star Ratings and Bond Fund Credit Quality measures. Mary Karen Dolan, Director of Mutual Fund Analysis at Morningstar, will enlighten us on recent research behind these measures and what it means to individual investors and financial advisors. Learn what information advisors look at online when reviewing Star Ratings and why fund companies should consider that when determining website content.

9:15 am **DIGITALLY EMPOWERING YOUR SALES FORCE**

Andrew Hsu, Vice President—Acquity Group

Rick Nash, Vice President—Acquity Group

A discussion on the recommended technology investments that will provide competitive advantages to a traditional, institutional sales force.

10:00 am **Take a Break**

Refreshments & Cell Phones

eCC Co-SPONSORED BY:



(continued)



eCC FORUM AGENDA

- 10:15 am** **WHAT FINANCIAL CONSUMERS EXPECT OF THE ONLINE EXPERIENCE TODAY
ARE WE MEETING THEIR EXPECTATIONS?**
Eric Head, Director, Business Development—ForeSee Results
Kathleen Whalen, Managing Director, Client Relations & Public Relations/Corporate Communications—DALBAR
More and more frequently consumers and financial professionals want to transact and be serviced via the Web. How do you know if your financial services website is meeting the needs and expectations of customers and prospects? Find out how scientific satisfaction analytics can help you quantify the critical role of your website and how it influences share of wallet, retention and cost-savings. And, see examples of best-in-class website features that successfully meet users' needs.
- 11:00 am** **PANEL PRESENTATION: LEVERING THE SOCIAL WEB IN MARKET DEVELOPMENT**
Moderator: Michael Ellison, President—Corporate Insight
Panelists: Paul P. O'Connell, Jr., Senior Vice President & Senior Web Manager—Putnam Investments
Despite Putnam's long established track record of more than 70 years of investment experience, Putnam has fully embraced the criticality social media now plays in creating sustainable differentiation. Learn how they started out monitoring the social web and its expanded vision and strategies for monitoring its Facebook Fan page and brand sentiment, in addition to the myriad of regulatory aspects necessary to manage social media.
Stephen Johnson, Director of Social Media—TIAA-CREF Mutual Funds
TIAA-CREF has leveraged social media as an important channel to strengthen engagement with their customers. Johnson will discuss TIAA-CREF's efforts and why social media isn't going away anytime soon.
- 12:00 pm** **Lunch**

(continued)



eCC FORUM AGENDA

1:00 pm SOCIAL MEDIA: MEASUREMENT IN A BLACK SWAN WORLD

Nan Dawkins, Founder & CEO—Serengeti Communications

As the results of traditional and tra-digital marketing continue to decline and the internet becomes increasingly driven by social communication, marketers can ill-afford to avoid social media. And yet, at the very moments marketers are most out of control of a rapidly evolving, highly volatile marketing theater, the C-Suite demands more control than ever, especially when it comes to measuring ROI. Learn what can be measured and how to connect the dots between multiple data sources to create an effective, compelling social media measurement framework for your company.

1:45 pm ROUNDTABLE

3:00 pm Forum Adjournment

6:00 pm STAR AWARDS RECEPTION

7:00 pm STAR AWARDS DINNER & AWARDS PRESENTATION

The only program in the industry to recognize excellence in e-commerce, plan participant, marketing, investor and advisor communications and education. Be on hand for the announcement of the 2010 STAR Awards winners.



COMMUNITY INVESTMENT AWARD

To acknowledge the significant contributions fund companies make to the well-being of their communities, MFEA will present this prestigious award to a fund company for outstanding community service contributions.

FUND COMPANY AWARDS

STAR Awards winners will be presented in three asset levels for retail, advisor and plan participant communications both print and online, as well as top awards for Overall Excellence in the three business segments.

9:00 pm Adjournment