

Outlook 2016 Panel Summaries and Moderators

Marketing and Technology

Moderator: Ted Lundgren

Panelists: Brian Boughner, Dexter Lyons, Marty Kerns, Steve Williamson

This dynamic panel will call on panelists and other attendees to find out what they do in regards to marketing/business development. Please keep in mind we are using “marketing” as a word to encompass sales, PR, marketing, and design. Think of this as Best Practices- what do you use and how has it worked well or why did it not work at all. And, how has technology impacted your efforts. What tools do you use, what tools do you not use...

Trading and Technology

Moderator: Jim Applegate

Panelists: Lee Harris, Jacob Deschenes, Patrick Beaudan, David Bush

This interactive panel will discuss what trading technology that members use daily, why and how. Think of this as Best Practices- what do you use and how has it worked well or why did it not work at all. And, how has technology impacted your efforts. What tools do you use, what tools do you not use, what tools do you use in tandem.

Active in a Passive World

Moderator: Emily Frazier

Panelists: Bob Porter, Paul Schatz, Jason Wilder,

The purpose of this panel is a discussion with NAAIM Members and other attendees to find out how they grow their business despite being in a world that mainly evaluates managers, strategies and funds through a fundamental model. What conversations do they have? What types of materials do they create and why? What has worked for you? And, how has technology impacted your efforts, if at all.

Industry Perspectives

Moderator: Emily Frazier

Panelists: Ed Kushma - ProFunds, Carl Resnick - Guggenheim, Catherine Ayres-Rigsby - Ceros/Advisors Preferred, Ed Eglinsky - Direxion

What is going on with NAAIM's partner firms that can help advisors in trading and in growing their businesses? What are their perspectives on technology and its impact on active money managers in regards to trading and raising assets? What are their best practices? What insights have they gleaned from how other advisors are growing and/or running their practices? Discover all the ways that NAAIM sponsors supply valuable resources, tools, data, and more to active investment managers.