

# NQR Intermediary INSIGHT Client Conference

April 26, 2018 | Seaport Hotel | Boston, MA



## Agenda

All Sessions - Lighthouse 1 | Breakfast & Lunch - Lighthouse 2

8:15 - 9:00 Breakfast and Registration

9:00 - 9:15 **NQR Welcome/Kickoff** Marianne Gonzalez  
Client Relationship Manager  
Client User Group Moderator

Doug Fortin  
President, Founding Partner

9:15 - 10:00 **Keynote Speaker**



John Randall  
Director  
Operations & Distribution  
Investment Company Institute

10:00 - 11:00 **Intermediary Speaker**



Michele A. Coletti, CEBS, QKA  
Executive Vice President  
Mid Atlantic Capital Group

11:00 - 11:15 Break

11:15 - 12:15 **Client Panel** *Moderated by:* Polly LeBarron  
Client Officer



Lenore Downs  
Director  
Regulatory Compliance  
Amundi Pioneer Asset Management



William J. Jacobs  
Head of Strategic Relationships  
Putnam Investor Services



Chris Kiatos  
Senior Director  
Intermediary Oversight & Payments  
Columbia Threadneedle Investments

12:15 - 1:15 Lunch

1:15 - 2:15 **Roundtable Discussions**

2:15 - 2:30 **Recap of Roundtable Discussions**

2:30 - 2:45 Break

2:45 - 3:15 **NQR Update** Catherine Coyne  
Vice President, Client Officer

3:15 - 3:30 **Closing/Thank You**