



8:15 – 9:00	Breakfast and Check-In		
9:00 – 9:15	NQR Welcome	Doug Fortin President, Founding Partner	Marianne Gonzalez Client Relationship Manager
9:15 – 10:15	Audit Firm Presentation	Christine Kotarba Advisory Managing Director Deloitte & Touche LLP	Brian Liebman Advisory Senior Manager Deloitte & Touche LLP
		Carolyn Mellett Advisory Senior Manager Deloitte & Touche LLP	<i>Tom Rowan</i> <i>Legal Counsel</i> <i>NQR Moderator</i>
10:15 – 11:15	Fund and Intermediary Interview	Colleen Donovan Operations Leader Putnam Investments	Lisa Klassen Principal Edward Jones
11:15 – 12:00	NQR Review Trends		
		12:00 – 1:15	Lunch
1:15 – 1:30	NQR Service Updates	Catherine Coyne Vice President, Client Officer	
1:30 – 2:30	Fund Panel	Kim Alpuerto Director of Intermediary Oversight John Hancock Investment Management	Mike Buberl Vice President T. Rowe Price Associates, Inc.
		Keri Bedoya Assistant Vice President Voya Investment Management	<i>Polly LeBarron</i> <i>Client Officer</i> <i>NQR Moderator</i>
2:30 – 4:00	Solutions Workshops		
4:00 – 6:00	Happy Hour at Tony C's		