



The Transformation of 3PM Contract and Compensation
Wednesday April 4, 12:00 – 1:00 EST

Proposed Agenda

1. **Welcome and Housekeeping** – 3PM Office
2. **Introduction** – Mike Pereira
3. **Recap of Discussion at 3PM Annual Conference** – Mike Pereira
4. **Trends in Contracts and Terms**
 - a. Agreement between 3PM and Investment Adviser
 - b. Agreement between the Adviser and Investor
5. **Developments in Regulation** (beyond Lobbying)
6. **Due Diligence in the new Era**
 - a. What should a 3PM look for when considering a potential manager client?
 - b. What are Advisers looking for when hiring a 3PM?
7. **Q&A** - Panelists