

2017 Annual Conference
Differentiating To Win: Marketing & Sales In the Current Environment

Chicago, IL
October 18-19, 2017

The Westin Chicago Northwest

Location:

The Westin Chicago Northwest
400 Park Blvd
Itasca, IL 60143
630.773.4000

Agenda

As of August 15, 2017 – subject to change

The annual conference is designed to meet the needs of outsourced sales and marketing professionals and money managers alike. At 3PM, we acknowledge the massive amount of change that is occurring in our industry each day. The 2017 Annual Conference for 3PM embraces that change in " Differentiating To Win: Marketing & Sales In the Current Environment". The conference serves as a casual and intimate environment perfect for networking and knowledge building. Combining structured thought-provoking panels and free-flowing networking sessions, attendees can expect to discuss various marketing, sales, regulatory and investment trends that present challenges and opportunities for our industry in the year ahead. Here are a few agenda topics:

- Differentiating Investment Managers Through Marketing
 - Change Is In The Air: Past, Present & Future Changes In Structural Norms That Are Defining Our Market
 - Efficient Technology Solutions At Work
 - Regulation & Marketing: The New Normal
 - Idea Share Break Out Sessions
 - Investor Trends Panel
 - 3PM At Work
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Wednesday, October 18, 2017

12:00 am – 5:00 pm Registration Open - Atrium

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Conference Begins (*Calling all 3PMs, Managers, Intermediaries & Marketers*)

1:00 pm – 1:15 pm **Welcome and Opening Remarks**

1:15 pm - 2:15 pm **Keynote Address: [TBD]**

2:30 pm - 3:30 pm **Investor Trends**

Listen to allocators talk about areas of focus and investor trends across traditional long only, alternative and emerging manager market segments.

3:30 pm – 4:00 pm **Break with Exhibitors**

4:00 pm – 5:00 pm **Change Is In The Air: Past, Present & Future Changes In Structural Norms That Are Defining Our Market**

Seeing sweeping changes happening before your eyes? So are we! Industry experts will provide an update on this ever changing market and what marketers and managers need to be aware of to make their efforts efficient and effective heading into 2018.

5:00 pm **Closing Remarks**

5:15 pm – 6:15 **New to 3PM Meet & Greet**

Come and meet with the 3PM Board – an opportunity for new 3PM members and 1st time conference attendees to ask direct questions, understand the value proposition of 3PM, and to network with the board.

6:30 pm – 9:30 pm **Networking Cocktail Reception and Dinner at the Lakeside Pavilion**



Please join us for lively conversation, some 3PM acknowledgements and words of wisdom from the board, and the opportunity to actively network with peers.

Thursday, October 19, 2017

8:00 am — 8:45 am **Continental Breakfast**

8:45 am – 9:00 am **Opening Remarks**

9:00 am – 10:00 am **Differentiating Investment Managers Through Marketing**

The number of investment managers seeking AUM is a constantly growing universe, all with their own story and value proposition. How do you differentiate your investment management capabilities from the crowd? Learn what tools you can use and what positioning matters most from our esteemed panelists.

10:00 am — 10:30 am **Morning Break with Exhibitors**

10:30 am – 11:30 am **Regulatory & Marketing: The New Normal**

The Regulatory environment continues to provide new challenges to investment management marketing and sales efforts with numerous regulatory changes underway as we enter 2018. Industry experts who know the outsourced marketing space will provide invaluable insight into the regulatory expectations and requirements of compliant firms. Whether you are registered as a BD, an RIA, or are affiliated with the same, whether you fall under FINRA, the MSRB or your state regulators, the market intelligence provided will be critical to remaining on the front line of regulatory expectations as we move into 2018.

11:30 am – 12:00 pm **3PM At Work**

Members of the Board of Directors will be on hand to discuss the many member benefits 3PM provides to its member. Utilizing any of these perks will help members save money and run their businesses more effectively. Taking advantage of events and programs like Manager Exchange can result in direct leads and opportunities. Expect to be wowed by how much you could be saving and taking advantage of!

12:00 pm – 12:45 pm **Networking Lunch**

Have you found a new client or opportunity yet at the conference? Join us for a networking lunch to meet some additional resources and take advantage of this unique forum.

1:00 pm – 2:00 pm **Efficient Technology Solutions To Maximize Your Market in 2018**

Are you interested in figuring out how to make marketing and sales easier and more cost efficient through technology? Learn more about various technology options, how they work and how to integrate them cost efficiently into your marketing efforts.

2:00 pm – 2:45 pm Idea Share—A Marketing and Manager Series

Due to the success of this session at past events, Idea Share (previously referred to as Speed Dialogue) is back by popular demand. During this session, attendees will be presented with a series of challenges and/or issues that any firm is likely to encounter throughout their tenure in this business. Attendees will be given a limited amount of time to discuss each topic with a small group of their peers and hear differing opinions on how to handle these real life situations. To keep things interesting each group will be shifted around after each issue is presented and discussed. The goal of this session is to give attendees an opportunity to meet as many firms as possible and hopefully come away with some new contacts and best practices. Because of the limited time allotted to each discussion group, there will be no time for introductions. As such, each attendee should come with a stack of business cards to give to the other firms they meet.

3:00 pm – 3:30 pm Afternoon Break with Exhibitors

3:30 pm – 4:30 pm The State of the Industry

Curious what is really happening within our industry? This session will provide a lively review of the market and potential areas of opportunity.

4:30 pm – 4:45 pm Conference Wrap-Up

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