



**Investment Management Platforms:
*Exploring Distribution & Global Product Development in the Credit Crisis Age***

PLEASE NOTE REVISED AGENDA

NOVEMBER 6th IMMI Research Forum

**Barclays Capital
1 Churchill Place, Canary Wharf**

- 12:00 noon **IMMI Member's Private Luncheon**
(by invitation only)
**McKinsey Roundtable Discussion:
Managing through the Credit Crisis**
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- 2:00 pm **Research Forum Opens, Welcoming Remarks**
- McKinsey & Company Presentation
**Global Asset Management Benchmarking &
Distribution Trends**
Presentation by **Tim Roberts**, Director,
McKinsey & Company
- 3:00 pm Cerulli & Associates
**Global Research Focus:
The International Marketplace for
Investment Management Services**
Shiv Taneja, Managing Director,
Cerulli International
- 4:00 pm **International Advisor Panel**
- Robert Reid**, President, Personal Finance Society
- Advisor Insight Survey 2008
Matthew Craig, Senior Consultant, CoreData
- Downside of Risk Management – An Advisory Essential
Shawn Brayman, President, PlanPlus
- 6:00 - 8:00 pm **Cocktail Reception Hosted by
Barclays Capital**
Canary Wharf View Lounge, 1 Churchill Place