



Bond Fund Symposium

Our inaugural event for bond mutual fund managers, professionals and servicers.

March 23-24, 2017 • The Hyatt Regency Boston • Boston, Mass.

Introducing Crane's Bond Fund Symposium

Dear Bond Fund & Fixed Income Professional:

Please join me for the inaugural **Crane's Bond Fund Symposium**, which will be held **March 23-24 at The Boston Hyatt Regency** in **Boston, Mass.** Crane Data, producer of **Money Fund Symposium**, and publisher of the **Money Fund Intelligence** and new

Bond Fund Intelligence newsletters, is launching its first conference for bond fund professionals.

BFS is just **\$500**, and will focus on **ultra-short bond funds**. But it will also address longer-term issues. We expect approximately 100 bond fund managers and fixed income dealers, issuers and strategists to join us. I hope to see you in Boston in March!
Sincerely, **Pete Crane**, President, **Crane Data**

Bond Fund Symposium Conference Agenda

Thursday, March 23

9:15-9:20 am **Welcome to Bond Fund Symposium**
Peter Crane, President & Publisher, **Crane Data**

9:20-10:00 am **Keynote: PIMCO's Short-Term Strategies**
Jerome Schneider, Managing Director, **PIMCO**

10:00-10:50 am **Segmenting the Ultra-Short Bond Market**
Moderator: **Peter Crane**, President & Publisher, **Crane Data**
Teresa Ho, Executive Director, **J.P. Morgan Securities**
Michael Morin, Director Inst. Port. Mgmt., **Fidelity Investments**
Dave Martucci, PM & Head of Mgd Res, **J.P. Morgan A.M.**

10:50-11:20 am **Coffee**
sponsored by **Fidelity Investments**

11:20-12:00 pm **Bond Strategist: Outlook for Rates & Spreads**
Mark Cabana, Director, **Bank of America Merrill Lynch**
Michael Cloherty, Head of Rates Strategy, **RBC Capital Markets**

12:00-12:30 pm **Ratings & Risks in Bond Funds**
Roger Merritt, Managing Director, **Fitch Ratings**
Peter Rizzo, Senior Director, **Standard & Poor's Ratings**

12:40-1:30 pm **Lunch** sponsored by **PIMCO**

1:30-2:20 pm **Senior Portfolio Manager Perspectives**
Moderator: **Peter Crane**, President & Publisher, **Crane Data**
Joanne Driscoll, Portfolio Manager, **Putnam Investments**
Sue Hill, Senior Portfolio Manager, **Federated Investors**
Additional Speaker TBD

2:20-3:10 pm **Major Issues in Fixed-Income Investing**
Moderator: **Alex Roever**, MD, **J.P. Morgan Securities**
Bob Ostrowski, CIO Fixed-Income, **Federated Investors**
Jeff Weaver, Head of Short Duration, **Wells Fargo Funds**
Tony Wong, Head of Global Credit Research, **Invesco**

3:10-3:40 pm **Break** sponsored by **J.P. Morgan A.M.**

3:40-4:20 pm **ETF Trends & ETF Investors; Fund Usage**
David Mazza, MD, **State Street Global Advisors**
Additional Speaker TBD

4:20-5:00 pm **Bond Index Funds & Indexes**
Brandon Bettencourt, **Fidelity Investments** (invited)

5:00-6:00pm **Cocktails**
sponsored by **Crane Data**

Friday, March 24

8:00-9:00 am **Breakfast** sponsored by **J.P. Morgan A.M.**

9:00-9:50 am **State of the Bond Fund Marketplace**
Peter Crane, President & Publisher, **Crane Data**
Sean Collins, Senior Director, **Investment Company Institute**
Ed Baldry, EMEA CEO, **Institutional Cash Distributors**

9:50-10:40 am **Regulatory Update: Liquidity, Fees & More**
Stephen Cohen, Partner, **Dechert LLP**
John Hunt, Partner, **Sullivan & Worcester LLP**

10:40-11:10 am **Coffee**
sponsored by **Invesco**

11:10-11:50 pm **Government Bond Fund Discussion**
Sue Hill, Senior Portfolio Manager, **Federated Investors**
Additional Speaker TBD

11:50-12:30 pm **Municipal Bond Fund Issues**
Kristian Lind, Senior VP, **Neuberger Berman**
Doug McGinley, Portfolio Manager, **Fidelity Investments**

12:30-1:30 pm **Lunch**
sponsored by **HSBC Global Asset Mgmt.**

1:30-2:20 pm **Corporate & High Yield Bond Funds**
Tom Connelley, VP/Sr PM, **State Street Global Advisors**
Joanne Ferullo, Senior Investmt Director, **Putnam Investments**
Sean Rhoderick, CIO Taxable Fixed-Inc, **PNC Capital Advisors**

2:20-3:10 pm **Bond Fund Data, Statistics & Software**
Peter Crane, President & Publisher, **Crane Data**
Roger Merritt, Managing Director, **Fitch Ratings**
James Morris, Managing Director, **Investortools**

3:10-3:30 pm **Refreshments**
sponsored by **State Street**

Bond Fund Symposium Sponsors & Exhibitors

Fitch Ratings **J.P. Morgan Asset Mgmt.** **BlackRock** **Bank of American Merrill Lynch** **PIMCO**
Fidelity Investments **Federated Investors** **State Street Global Advisors** **Invesco** **Crane Data**



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Exhibitors - \$2,000

- * Recognition in conference brochure, website, etc.
- * Tabletop booth space, including table and chairs.
- * Includes two conference registrations & attendee list.

Bronze - \$3,000

- * Recognition in conference brochure, website, etc..
- * Includes sponsorship of coffee or afternoon break and recognition during the break.
- * Tabletop booth space, including table and chairs.
- * Includes three conference registrations & list of attendees.

Silver - \$4,000

- * Recognition in conference brochure, website.
- * Includes sponsorship coffee or afternoon break and recognition during the break.
- * Tabletop booth space, including table and chairs.
- * Includes four registrations & attendee list.

Gold - \$5,000

- * Highest level of recognition in conference brochure, website, program and during the conference.
- * Includes sponsorship of lunch, cocktails, other.

- * First selection of booth space, tables, chairs.
- * Includes five conference registrations.
- * Includes list of attendees with detailed contact information, plus a briefing on conference feedback.

Platinum - \$6,000

- * Includes sponsorship of dinner or other available segment.
- * Highest level of recognition in conf. brochure, website, etc.
- * First selection of booth space, including tables and chairs.
- * Includes 6 conference registrations.
- * Includes list of attendees with detailed contact information,

Crane's Bond Fund Symposium Thanks Our 2017 Sponsors!



Crane's Money Fund Symposium 2017

June 21-23 2017

Atlanta, Ga.



Crane Data LLC

measures money and provides competitive intelligence on money market & bond mutual funds. Crane Data was

founded by money fund expert **Peter G. Crane** and computer & statistics guru **Shaun Cutts**. Our mission is faster, cheaper, and cleaner fund information.

Crane Data

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About The Hyatt Regency Boston

The **Hyatt Regency Boston** is set in the heart of downtown Boston's financial district and offers guests easy access to historical attractions, shopping, entertainment, and dining. Call the **Hyatt** at **1-888-421-1442** in order to secure the **conference rate of \$179** (plus tax) or click here (<https://aws.passkey.com/g/50434688>). Reservations must be made before our block is sold out or **Feb. 22**. For more information, visit the website www.bondfundsymposium.com or contact **Peter Crane** (508-439-4419 or pete@cranedata.com) or **Devon Binder** at **Red Door Alliances** (devon@reddooralliances.com or 303-946-2522) with any questions or requests.

