



# The 10th Annual Mastering Client Services and RFPs for Institutional Investors

## March 25-26, 2025

### Harvard Club of New York City, NY

## Past Agenda

[TUESDAY](#)

[WEDNESDAY](#)

TIME ZONE: EST

### TUESDAY - MARCH 25, 2025

8:00 AM  
|  
4:00 PM

Registration Desk Open  
**Registration Desk Hours:** 8:00AM - 4:00PM

8:00 AM  
9:00 AM

Networking Breakfast

8:00 AM  
|  
6:00 PM

Exhibit Hall Open

9:00 AM  
|  
9:10 AM

Day 1 Opening Remarks  
Alexandria Jenkins, Senior Manager, RFP  
**Invesco**

9:10 AM

Driving Success Through Team Collaboration: Optimizing RFP Processes Across Departments

- Discover best practices for coordinating efforts across sales, marketing, and product management teams
- Learn how to implement efficient workflows for collecting and managing data during the RFP process
- Review strategies to navigate compliance challenges effectively while ensuring alignment across teams

Alexandria Jenkins, Senior Manager, RFP  
**Invesco**



10:00 AM

Michael Clarke, Head of Client Reporting and Performance  
Walter Scott and Partners

10:00 AM

Selecting and Onboarding Vendors for RFP Excellence

- Review criteria for evaluating vendor scalability and alignment with firm objectives
- Discuss strategies for mitigating vendor-related compliance risks
- Learn how to integrate vendor solutions into end-to-end RFP workflows

Jared Spann, Associate Director, RFP  
Principal Asset Management

Kristen Carloni, Head of Aladdin Sales Operations  
Aladdin by BlackRock

Morgan Struebing, Senior Content Editor  
Principal Asset Management

10:50 AM

10:50 AM

Networking Break

11:10 AM

11:10 AM

Beyond the Finals Deck: Winning Presentations for Institutional Clients

- Learn methods for tailoring presentations to institutional clients' priorities
- Outline strategies for aligning final presentations with RFP narratives
- Review examples of interactive pitch technologies used by top firms

Shahrukh Khan, Editor in Chief  
Cash and Carried, A Private Funds Newsletter

Keith Eiger, Director  
Alan Biller and Associates

Peter Tarrant, Founder  
PilotShip

12:00 PM

12:00 PM

Networking Lunch

1:00 PM

1:00 PM

Navigating Consultant Database Challenges: Unlocking Competitive Insights

- Outline strategies to keep consultant data aligned with evolving product offerings
- Discover how top firms utilize database insights in crafting RFP responses
- Hear how to partner with your sales teams to use databases for prospecting.

Danielle Corey, Associate Director  
MFS Investment Management

Matt Plucienik, Content Strategy & RFP Manager  
Vanguard

1:50 PM

Lauren White, Director of Marketing Databases  
**Fidelity Institutional and Asset Management Marketing**

1:50 PM

**Modernizing RFP Processes: Innovation, Compliance, and Executive Alignment**

- Understand how to transition from legacy RFP processes to AI-driven approaches that improve efficiency and outcomes
- Outline a roadmap for building a strong business case for AI adoption that aligns with compliance requirements
- Discover techniques to win C-suite and compliance buy-in by demonstrating AI's value and scalability in business operations

Krishna Rangarajan, Founder  
**BigPi**

Dylan Lane, Vice President, IR Infrastructure and Due Diligence  
**AEW Capital Management**

Elaine Flynn, Lead Manager  
**Equitable**

2:40 PM

2:40 PM

**Networking Break**

3:00 PM

3:00 PM

**Leveraging Data for Smarter RFP Decisions**

- Focus proposals on client-specific goals to understand bidding reasons, money management and alignment with their portfolio strategy
- Evaluate metrics to understand competition, spot opportunities, and assess consultant database effectiveness
- Use data to identify and decline RFPs with low win potential when resources are tight

Zack Bono, VP, Director, Business Services and Support  
**Federated Hermes**

Russell Elliott, Head of Asset Management Market Intelligence  
**eVestment**

Wendy Chan, Vice President  
**Morgan Stanley**

4:00 PM

4:00 PM

**Smarter RFPs: How AI is Reshaping Financial Services**

- Discuss insights on emerging trends and technologies shaping the financial services industry
- Explore how financial services firms are using AI when fundraising
- Learn how AI can be used for DDQs and Pitchbooks

Kym Harrington, CEO  
**SalesEdge LLC**

Maki Hattori, Managing Director, Head of Investor Relations, Marketing  
**Wafra**

Stephanie Cadena, Senior Investor Relations Associate  
**Shenkman Capital Management**



Rachel Brown, Director, Global Database and Content Management  
**Manulife Investment Management**

4:50 PM

4:50 PM

Day 1 Closing Remarks

Alexandria Jenkins, Senior Manager, RFP  
**Invesco**

5:00 PM

5:00 PM

Networking Cocktail Reception

Join us for drinks, hors d'oeuvres, and face-to-face networking with peers.

6:00 PM

## WEDNESDAY - MARCH 26, 2025

8:00 AM

Registration Desk Open

**Registration Desk Hours:** 8:00AM - 11:00AM

11:00 AM

8:00 AM

Networking Breakfast

9:00 AM

8:00 AM

Exhibit Hall Open

1:35 PM

9:00 AM

Welcome Remarks and Day One Takeaways

Erich Wolters, Vice President of Enterprise Sales  
**Loopio**

9:10 AM

9:10 AM

From Automation to Intelligence: How AI is transforming RFPs and DDQs

- Learn how AI is reshaping the role and impact of proposal teams
- Discuss the limit of AI in handling complex investment narratives - and where human oversight remains critical
- Build the foundation for implementing AI while adhering to compliance standards and mitigating risk

Zahra Foradi, RFP Lead Analyst  
**MFS Investment Management**

Jennifer Cannizzaro, VP of Product Marketing  
**Responsive**

Sydney Blackett, RFP Content Strategy Manager  
**Invesco**

10:00 AM

10:00 AM

Optimizing RFP and Client Services Team Structures for Scalability

- Examine effective reporting hierarchies for RFP and client services teams

- Learn to integrate RFP and institutional sales roles for better synergy
- Discuss strategies for resource allocation during peak proposal cycles

Elana Margulies-Snyderman, *Director*  
**Eisner Advisory Group**

Kristen Albie, *Vice President, Proposal Services*  
**Fidelity Institutional and Asset Management Marketing**

Michael Clarke, Head of Client Reporting and Performance  
**Walter Scott and Partners**

Colleen Dunne, *Head of Americas and EMEA RFP & Global Databases*  
**Invesco**

11:00 AM

11:00 AM

Tools & Technology Spotlight

Beth Goonan, Vice President of Sales  
**SalesEdge LLC**

Beth Loucks, Customer Success Manager  
**SalesEdge LLC**

11:20 AM

11:20 AM

Post-RFP Client Onboarding: Building Long-Term Relationships

- Learn to structure seamless handoffs between RFP and client services teams
- Discuss strategies for aligning onboarding processes with RFP commitments
- Discover approaches for reinforcing trust during the onboarding phase

Nancy Vailakis, Principal  
**Ancram IRBD**

Keith Eiger, *Director*  
**Alan Biller and Associates**

Lauren Caldwell, *Client Relationship Manager*  
**Kennedy Capital Management**

Sari Mayer, Director of Marketing and Investor Relations  
**Global Credit Advisers**

12:20 PM

12:20 PM

Networking Lunch

1:20 PM

1:20 PM

Elevating Due Diligence Questionnaires (DDQs) for RFP Success

- Review techniques for streamlining DDQ responses to meet RFP deadlines
- Discuss how to align DDQs with evolving investor priorities
- Learn to balance comprehensiveness with clarity in DDQ narratives

Elana Margulies-Snyderman, Director  
**Eisner Advisory Group**

Bruce Kahn, Senior Portfolio Manager

Shelton Capital Management

Vicky Berke, Executive Director, Global Head of Business Development Services

Morgan Stanley

Brittany Matisz, Principal Customer Success Manager

Loopio

2:20 PM

2:20 PM

Roundtable Discussion: Rethinking Resilience – Stress Management Strategies for RFP Teams

- Define burnout and how to prevent it in yourself and your teams
- Learn how to foster a team culture that encourages open conversations about workload and stress
- Discuss strategies for gathering continuous employee feedback to implement the best wellness initiatives for your company

Georgia Homsany, Founder & CEO

Daily Dose Wellness

2:50 PM

2:50 PM

Closing Remarks

Erich Wolters, Vice President of Enterprise Sales

Loopio

2:55 PM

Wilmington, NC

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