

VIDEO

May 7, 2010

2010 Operations and Technology Conference Highlights (video)

VIDEO HIGHLIGHTS

2010 Operations and Technology Conference
May 5-7, 2010
Washington, DC

Mutual Fund Cost Basis Reporting: Preparing for 2012

- **Karen Gibian**, Moderator
Associate Counsel – Tax Law, Investment Company Institute
- **Jeff Naylor**
VP, Business Development and Industry Relations, SunGard
- **Jeanne Falstrom Ross**
Attorney Advisor, Tax Legislative Counsel, Office of Tax Policy, U.S. Treasury Department
- **Laura Stanley**
VP, Dealer Services, Invesco Aim
- **Brendan Sullivan**
Director, Pershing, LLC

Meet the New Omnibus: Not the Old Omnibus

- **Nino Palermo**, Moderator
Vice President, American Funds
- **Robert J. Adams**
Executive Vice President, National Financial Services
- **Michael Duffy**
President, DST TASS
- **David Long**
Principal, Edward Jones Investments
- **Michael McNeil**
Senior Vice President, Putnam Investments

Connecting Today: How Asset Managers Are Using Social Media and Why

- **Pat Allen**, Moderator
Principal, Rock the Boat Marketing
- **Amy Dobra**
Principal, Marketing, Vanguard
- **Sheryl Larson**
Vice President, Corporate Online Marketing, Northern Trust
- **Lawrence Stadulis**
Partner-in-Charge, Stradley, Ronon Stevens & Young, LLP

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