



Touchstone Active Management Academy

The University of Notre Dame • Mendoza College of Business

Stayer Center for Executive Education

SUNDAY, OCTOBER 23, 2022

4:00 – 5:30 pm <i>Meet in Morris Inn Lobby</i>	Campus Tour (Optional)
6:00 pm – 9:00 pm <i>Seven on 9 2010 Moose Kraus Circle</i>	Welcome Reception and Dinner <i>Seven on 9 is located in the Corbett Family Hall at Notre Dame Stadium</i> <ul style="list-style-type: none"> • 6:00 pm Reception • 7:00 pm Dinner

MONDAY, OCTOBER 24, 2022

7:00 – 8:00 am <i>Rohr's or Cafe J, Morris Inn</i>	Breakfast – <i>On your own</i> <i>Voucher will be given at check-in, it is good for Rohr's (sit down) or Cafe J (grab & go)</i>
8:00 – 8:20 <i>Stayer Center Commons A & B</i>	Welcome to Active Management Deconstructed <ul style="list-style-type: none"> • Steve LaChance, <i>Senior Vice President, National Sales Manager, Wealth Management Consulting, LPL</i> • Blake Moore, <i>President & CEO, Touchstone Investments</i> • Tim Paulin, <i>CFA, Senior Vice President Research & Product Development, Touchstone Investments</i>
8:20 – 10:00	Active Share and the Three Pillars of Active Management Skill, Conviction, Opportunity and Integrating Patience, Expenses and Active Fees <ul style="list-style-type: none"> • Martijn Cremers, <i>Martin J. Gillen Dean and the Bernard J. Hank Professor of Finance at The University of Notre Dame's Mendoza College of Business</i>
10:00 – 10:10	Group Photo / Break
10:10 – 11:00	Practical Application of Active Share and SCOPE Application of concepts explored in Martijn Cremers' academic literature with practical techniques to improve active manager evaluation and selection <ul style="list-style-type: none"> • Tim Paulin
11:00 – 12:00 pm	Hands-On Workshop Evaluating Funds with ActiveShare.Info
12:00 – 1:00 <i>Smith Family Ballroom, Morris Inn</i>	Lunch
1:00 – 1:50 <i>Stayer Center Commons A & B</i>	Challenging the Conventional Wisdom on Active Management Highlights of the Past 20 Years of Academic Literature <ul style="list-style-type: none"> • Timothy B. Riley, <i>Sam M. Walton College of Business, University of Arkansas</i>
1:50 – 2:00	Break
2:00 – 2:50	Measuring Skill Overcoming the typical pitfalls of fund evaluation based on recent performance <ul style="list-style-type: none"> • Martijn Cremers • Tim Paulin
2:50 – 3:00	Wrap-up