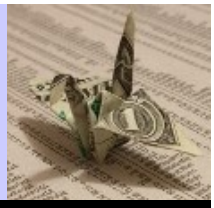
CRANE DATA
measuring money markets

Conference for Bond Fund Managers and Professionals

Bond Fund Symposium

Our 6th annual event for bond mutual fund managers, professionals and servicers.



March 23-24, 2023 • Hyatt Regency Boston • Boston, Mass.

Crane's Bond Fund Symposium 2023

Dear Bond Fund & Fixed Income Professional:

Mark your calendars for ***Bond Fund Symposium 2023***, which will take place ***March 23-24, 2023*** at **The Hyatt Regency in Boston**, **Mass.**! Thanks to those who attended our recent event in Newport Beach, Calif., and we hope to see you in Boston in '23.

Crane's Bond Fund Symposium **focuses on ultra-short bond funds**, **bond funds and fixed-income ETFs**, and attracts bond fund managers, fixed-income dealers, issuers and strategists since 2016. **Registration for *BFS*** is **$750**, and includes access to the 2-day event and materials, plus meals and refreshments. Sponsorship packages are $3K, $4K and $5K. We hope you'll join us next year! Sincerely, ***Pete Crane***, *President,* ***Crane Data***

Bond Fund Symposium Conference Agenda

PREVIOUS YEAR's AGENDA;
WATCH FOR UPDATE 9/22

Thursday, March 23

9:10-9:20am **Welcome to Bond Fund Symposium 2023**
Peter Crane, *President & Publisher,* ***Crane Data***
9:20-10:10am **State of the Bond Fund Marketplace**
Shelly Antoniewicz, *Sr Director,* ***Investment Co. Institute***
Peter Crane, *President & Publisher,* ***Crane Data***
10:10-11:00am **Bond Market Strategists: Rates & Risks**
Ira Jersey, *Chief Rates Strategist,* ***Bloomberg Intelligence***
Alex Roever, *MD,* ***J.P. Morgan Securities***
11:00-11:30am **Coffee Break**
sponsored by ***Northern Trust Asset Mgmt.***
11:30-12:20pm **ETF & Near-Cash ETF Trends**
Brian McMullen, *ETF Strategist,* ***Invesco***
James Palmieri, *Managing Director,* ***State Street Global Adv.***
12:20-1:20pm **Lunch**
sponsored by ***J.P. Morgan A.M.***
1:20-2:10pm **Senior Portfolio Manager Perspectives**
Moderator: ***Peter Crane***, *President,* ***Crane Data***
Morten Olsen, *Senior VP,* ***Northern Trust AM***
Dave Rothweiler, *Portfolio Manager,* ***UBS Asset Mgmt***
Andrew Wittkop, *Exec VP & Portfolio Manager,* ***PIMCO***
2:10-3:00pm **Ultra-Shorts, LGIPs & Bond Fund Ratings**
Peter Gargiulo, *Director,* ***Fitch Ratings***
Guyna Johnson, *Senior Director,* ***S&P Global***
3:00-3:30pm **Refreshments**
sponsored by ***Bank of America***
3:30-4:20pm **Major Issues in Fixed-Income Investing**
Moderator: ***Logan Miller***, *Credit Strategist,* ***Wells Fargo***
Matthew Brill, *I-G Portfolio Manager,* ***Invesco***
Michael Cloherty, *Head US Rates Strategist,* ***UBS***
4:20-5:00pm **ESG Issues in the Bond Fund Space**
Henry Shilling, *Founder,* ***Sustainable Research & Analysis***
Dave Martucci, *PM & Head of Mgd Res,* ***J.P. Morgan A.M.***
5:00-6:00pm **Cocktails**
sponsored by ***Wells Fargo Securities***

Friday, March 24

8:00-9:00am **Breakfast**
sponsored by ***Federated Hermes***
9:00-10:00am **Money Funds & Conservative Ultra-Shorts**
Peter Crane, *President & Publisher,* ***Crane Data***
Kerry Pope, *Director Inst PM,* ***Fidelity Investments***
10:00-11:00am **Regulatory Update: Bond Fund Issues '23**
Jamie Gershkow, *Partner,* ***Stradley Ronon Stevens & Young***
Peter Crane, *President,* ***Crane Data***
11:00-11:30am **Break**
sponsored by ***UBS Asset Management***
11:30-12:15pm **Govt & Muni Bond Fund Discussion**
Mike Kitchen, *Portfolio Manager,* ***Cavanal Hill Inv. Mgmt.***
Kristian Lind, *Managing Director,* ***Neuberger Berman***
12:15-12:30pm **Bond Fund Data & Crane Product Demo**
Peter Crane, *President & Publisher,* ***Crane Data***

Register at: **https://www.cranesbfsymposium.com/.**

Bond Fund Symposium Sponsors & Exhibitors

Northern Trust ***Bank of America*** ***Federated Hermes*** ***J.P. Morgan A.M.*** ***UBS Asset Mgmt.*** ***Morgan Stanley I.M.***
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Thank You to Our Sponsors and Speakers!

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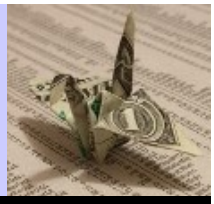
Conference for Bond Fund Managers and Professionals

Bond Fund Symposium

Our 5th annual event for bond mutual fund managers, professionals and investors.



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Crane's Bond Fund Symposium Sponsorship Opportunities

Bronze Sponsor - $3,000

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- Includes sponsorship of break.
- Includes 2 conference registrations.
- Includes list of attendees.

Silver Sponsor - $4,000

- Recognition in conference brochure, website, program and during the conference.
- Includes sponsorship of available break.
- Includes 4 conference registrations.
- Includes list of attendees with contact information.

Gold Sponsor - $5,000

- Highest level of recognition in conference brochure, website and during the conference.
- Includes sponsorship of break.
- Includes 6+ conference registrations.
- Includes list of attendees with detailed contact information, plus a briefing on conference feedback.

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Crane's Money Fund Symposium 2022 **June 20-22, 2022** **Minneapolis, Minn.**

Crane Data

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.*

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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 **617-912-1234** in order to secure the conference rate of $239 (plus tax) or click here. Reservations must be made before our block is sold out or Feb. 21. For more information, visit the website **www.bondfundsymposium.com** or contact **Peter Crane** (508-439-4419 or pete@cranedata.com) or **Natielli Mendes** (nmendes@cranedata.com or 508-870-2929) with any questions or requests.

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