

2010 Annual Conference Agenda Details

Tuesday, July 13, 2010

- 7:00 a.m. **Golf Tournament Registration – Ocean Course**
 8:00 a.m. **Golf Tournament – Ocean Course – Shotgun Start**
 12:00 p.m. – 5:00 p.m. **Registration/Information Desk/ Hospitality Suite – Ocean Pre Function**
 2:00 p.m. – 5:00 p.m. **SunGard Client Session – Product Training/Roundtable Discussion**
 CSSII – Crescent
 FASTOCK – Flagler
 6:00 p.m. – 7:30 p.m. **Welcome Reception – Grand Event Lawn**

Wednesday, July 14, 2010

- 7:30 a.m. – 12:00 p.m. **Registration/Information Desk – Ocean Pre Function**
 7:30 a.m. – 9:00 a.m. **Buffet Breakfast & Sponsors Exhibits – Atlantic Ballroom & Pre Function**
 8:30 a.m. – 12:00 p.m. **MORNING SESSION – Ocean Ballroom**
 • **Welcome** – Karen Danielson, SSA Conference Coordinator
 Jim Alden, SSA Conference Co-Coordinator
 • **SSA Update** – Joni Aeschbach, President, SSA, Alliant Energy Corporation
 9:00 a.m. – 10:15 a.m. **Keynote Speaker: Making a Difference - Purpose, Passion and Pride**
 Steve Gilliland
 10:15 a.m. – 10:45 a.m. **Networking Break & Sponsors Exhibits – Atlantic Pre Function**
 10:45 a.m. – 12:00 p.m. **Industry Updates**
Moderator: Keir D. Gumbs, Covington & Burling LLP
Speakers: **SEC Update** – Susan Petersen, U.S. Securities and Exchange Commission
NYSE Update – Judy McLevey, NYSE Euronext.
 12:00 p.m. – 1:30 p.m. **Lunch (On Your Own)**
 12:00 p.m. – 1:30 p.m. **SSA First Time Attendees Luncheon – Vilano**
 1:30 p.m. – 2:45 p.m. **SSA AFTERNOON SESSION - Ocean Ballroom**
 • **Managing Internal and External Risk**
Moderator: Jim Alden, The Walt Disney Company
Speakers: Dorothy Flynn, The Keane Organization, Inc.
 Nick Nichols, Venio, LLC
 Anne Kuhns, The Walt Disney Company
 Val Golin, ING Bank
 Craig Carter, KPMG
 2:45 p.m. – 3:00 p.m. **SunGard Networking Break – Atlantic Pre Function**
 3:00 p.m. – 3:30 p.m. **SunGard Client Session – Product Updates**
Speakers: David Shaver, SunGard, CSSII - Vilano
 John Kirksey, SunGard, FASTOCK - Crescent
 Richard Mills, SunGard, SUNSTAR – Flagler
 3:30 p.m. – 5:00 p.m. **SunGard Client Session - Crescent**
 6:30 p.m. – 10:00 p.m. **Luau – Lodge Event Lawn Dinner and Entertainment**

Thursday, July 15, 2010

- 7:30 a.m. – 12:00 p.m. **Registration/Information Desk – Ocean Pre Function**
 7:30 a.m. – 9:00 a.m. **Buffet Breakfast – Center Courtyard**
 9:00 a.m. – 11:00 a.m. **Spouse/Guest Breakfast – Crescent**
 8:30 a.m. – 12:00 p.m. **MORNING SESSION – Ocean Ballroom**
 8:30 a.m. – 10:00 a.m. **Regulatory Issues – What's Next**
Moderator: Katie Sevcik, Wells Fargo Shareowner Services
Speakers: Susan Petersen, U.S. Securities and Exchange Commission
 Judy McLevey, NYSE Euronext
 Niels C. Holch, Shareholder Communications Coalition
 10:00 a.m. – 10:15 a.m. **Networking Break – Ocean Pre Function**
 10:15 a.m. – 12:00 p.m. **Shareholder Activism – Where do we go from here?**
Moderator: Ron Schneider, Laurel Hill Advisory Group, LLC.
Speakers: Pat McGurn, ISS
 Chris Dowd, Georgeson Inc.
 Stephen Brown, TIAA-CREF
 12:00 p.m. – 1:30 p.m. **Lunch (On Your Own)**
 1:30 p.m. – 2:45 p.m. **AFTERNOON SESSION – Ocean Ballroom**
 • **Open Forum with ALL of This Morning's Speakers**
Moderators: Katie Sevcik and Ron Schneider
Audience Participation and Interaction
 3:00 p.m. – 3:15 p.m. **SunGard Networking Break – Atlantic Pre Function**
 3:15 p.m. – 5:00 p.m. **SunGard Client Session – Update/Product Demonstration - Vilano**
 6:00 p.m. – 7:00 p.m. **Reception – Ocean Pre Function**
 7:00 p.m. – 11:00 p.m. **Dinner/Dance – Ocean Ballroom**
 9:00 p.m. – 11:00 p.m. **Espresso Bar – Ocean Pre Function**

Friday, July 16, 2010

- 8:00 a.m. – 12:00 p.m. **Information Desk – Ocean Pre Function**
 8:00 a.m. – 9:30 a.m. **Buffet Breakfast – Center Courtyard**
 9:00 a.m. – 11:00 a.m. **MORNING SESSION – Ocean Ballroom**
 • **Cost Basis Reporting is Law. Are you ready to comply?**
Moderator: Joan DiBlasi, Aflac Incorporated
Speakers: Kevin McCosker, Pershing LLC
 Andrew Schwartz, BNY Mellon Shareowner Services
 Lydia Midwood, The Depository Trust and Clearing Corp.
 11:00 a.m. – 12:00 p.m. **Closing Remarks – Ocean Ballroom**
Note: There will **NOT** be a scheduled break on Friday morning. Refreshments will be available throughout the morning.