

GIPS® Standards Annual Conference 2007 Attendee Profile

Job Title	Business Name	City	State	Country
	KPMG	Glasgow		United Kingdom
	JPMorgan Asset Management	Jersey City	NJ	United States
	Evergreen Investments	Boston	MA	United States
	Evergreen Investments	Boston	MA	United States
	Grantham, Mayo, Van Otterloo & Co. LLC	Boston	MA	United States
	Capital Guardian	Los Angeles	CA	United States
	AAM	Chicago	IL	United States
		Columbus	OH	United States
	KPMG Advisory	Barcelona		Spain
	Ashland	Medford	OR	United States
Analyst	Lazard Asset Management	New York	NY	United States
Assistant Manager, Performance	CIBC Global Asset Management	Montreal	QC	Canada
Assistant Vice President	Wachovia Securities	Richmond	VA	United States
Assistant Vice President	Amalgamated Bank	New York	NY	United States
Assistant Vice President, Operations	Waddell & Reed Investment Management Company	Overland Park	KS	United States
Associate	DE Shaw	New York	NY	United States
Associate	Goldman Sachs	New York	NY	United States
Associate	Deloitte Financial Advisory Services	Copenhagen		Denmark
Associate Partner	Deloitte & Touche LLP	Toronto	ON	Canada
Associate Portfolio Manager	Securian Trust Company NA	Plymouth	MN	United States
Associate Vice President	Caisse de Depot et Placement du Quebec	Montreal	QC	Canada
Audit Supervisor	Keiter, Stephens	Glen Allen	VA	United States
Auditor	Deloitte & Touche LLP	Chicago	IL	United States
AVP, Data/Performance	MBIA Asset Management	Armonk	NY	United States
Business Analyst	The San Francisco Foundation	San Francisco	CA	United States
Business Analyst		Chicago	IL	United States
Calamos Investments	Institutional Operations Supervisor	Naperville	IL	United States
Certified Public Accountant	Mengel, Metzger, Barr & Company	Rochester	NY	United States
Chairman of Performa	Performa	London		United Kingdom
Chief Administrative Officer	Brown Capital Management	Baltimore	MD	United States
Chief Administrative Officer	Pzena Investment Management	New York	NY	United States
Chief Compliance Officer	Arcadia Investment Management Corporation	Kalamazoo	MI	United States
Chief Compliance Officer	IronBridge Capital Management, L.P.	Oakbrook Terrace	IL	United States
Chief Compliance Officer	Prospect Asset Management	Honolulu	HI	United States
Chief Compliance Officer	ING Clarion Real Estate Securites LP	Radner	PA	United States
Chief Compliance Officer and Operations Technology Specialist	GlobeFlex Capital, L.P.	San Diego	CA	United States
Chief Complicance Officer	West Gate Investments	Charlottesville	VA	United States
Chief Executive Officer	Austin, Calvert & Flavin, Inc.	San Antonio	TX	United States
Chief Financial Officer	First Quadrant, L.P.	Pasadena	CA	United States

For more information, please contact Andy Jenkins at andy.jenkins@cfainstitute.org.

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Attendee Profile

Client Administration Analyst	Fiduciary Asset Management	St. Louis	MO	United States
Client Manager	Performa	London		United Kingdom
Client Relationship Manager	Kestrel Investment Management	San Mateo	CA	United States
Client Service Representative	Sands Capital Management, LLC	Arlington	VA	United States
Client Service Representative	Sands Capital Management, LLC	Arlington	VA	United States
Client Service Specialist	IronBridge Capital Management, L.P.	Oakbrook Terrace	IL	United States
Client Services & Performance Specialist	IronBridge Capital Management, L.P.	Oakbrook Terrace	IL	United States
Company Secretary	National Association of Pension Funds	London		United Kingdom
Compliance Administrator, Performance	Duff & Phelps Investment Management Company	Chicago	IL	United States
Compliance Officer	Standish Mellon Asset Management	Boston	MA	United States
Compliance Officer	Legg Mason	Baltimore	MD	United States
Compliance Specialist	Artisan Partners Limited Partnership	Milwaukee	WI	United States
Consultant	Vincent Performance Services	Portland	OR	United States
Consultant	DST Systems, Inc.	Olathe	KS	United States
Controller	Cyrte Investments	Naarden		Netherlands
Controller	Marsico Capital Management, LLC	Denver	CO	United States
Controller	Cyrte Investments	Naarden		Netherlands
Director	Babson Capital Management LLC	Springfield	MA	United States
Director	BlackRock	Boston	MA	United States
Director	Deloitte Capital Markets Services	Copenhagen S		Denmark
Director of Investments	Teachers' Retirement System of Illinois	Springfield	IL	United States
Director of Operations	Legg Mason Capital Management	Baltimore	MD	United States
Director of Operations	Argent Capital Management LLC	Clayton	MO	United States
Director of Performance	Columbia Wanger Asset Management	Oswego	IL	United States
Director of Performance	Ashland	Medford	OR	United States
Director of Performance	Ashfield Capital Partners, LLC	San Francisco	CA	United States
Director of Performance Measurement	Riversource Investments	Minneapolis	MN	United States
Director of Research	Bull Wealth Management Inc.	Toronto	ON	Canada
Director of Trading and Reporting	Quantitative Advantage, LLC	Minnetonka	MN	United States
Director, Client Technology and Global Performance	AXA Rosenberg	Orinda	CA	United States
Director, GIPS	Columbia Management	Boston	MA	United States
Director, Head of Global Performance Reporting	Legg Mason & Co., LLC	New York	NY	United States
Director, Performance Measurement and Analytics	Neuberger Berman	New York	NY	United States
Director, Portfolio Analytics	INTECH	Palm Beach Gardens	FL	United States
Executive Director	Sterling Capital Management LLC	Charlotte	NC	United States
Executive Director, Performance Reporting	Morgan Stanley	Jersey City	NJ	United States
Fund Analyst	Abu Dhabi Investment Authority	Abu Dhabi		United Arab Emirates
GIPS Manager	T. Rowe Price Associates	Baltimore	MD	United States
Global Head of Performance Measurement	INVESCO	Louisville	KY	United States
Group Manager	Wellington Management	Boston	MA	United States

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Head of Performance	Mondrian Investment Partners	London		United Kingdom
Head of Research	OFI Institutional	Bellefonte	PA	United States
Head of U.S. Performance	UBS Global Asset Management	Chicago	IL	United States
Investment Analyst	Managed Asset Portfolios	Oakland Twp	MI	United States
Investment Analyst	Arizona Public Safety Personnel Retirement System	Phoenix	AZ	United States
Investment Associate	Northern Trust Investments	West Palm Beach	FL	United States
Investment Performance Analyst	INTECH	Palm Beach Gardens	FL	United States
Investment Performance Analyst	South Texas Money Management, LTD.	San Antonio	TX	United States
Investment Portfolio Accountant	First Quadrant	Pasadena	CA	United States
Investments Performance Analyst	Columbia Wanger Asset Management	Chicago	IL	United States
Jr. Quantitative Analyst	Julius Baer Investment Management LLC	New York	NY	United States
Lead Performance Analyst	Riversource Investments	Minneapolis	MN	United States
Legal/Compliance	Pioneer Investments	Boston	MA	United States
Manager	Kaufman, Rossin & Company	Miami	FL	United States
Manager	Franklin Templeton Investments	San Mateo	CA	United States
Manager	Calamos Investmnets	Naperville	IL	United States
Manager	Ernst & Young LLP	Montreal	QC	Canada
Manager of Client Reporting	LCG Associates, Inc.	Atlanta	GA	United States
Manager of Investment Systems	Whitnell & Co.	Oak Brook	IL	United States
Manager of Performance	The Boston Company LLC	Boston	Ma	United States
Manager of Performance	Bank of Oklahoma	Tulsa	OK	United States
Manager of Performance Analysis	Waddell & Reed	Overland Park	KS	United States
Manager of Performance and Risk	Ontario Workplace Saftety and Insurance Board	Toronto	ON	Canada
Manager, Administration	Cardinal Capital Management, Inc.	Winnipeg	MB	Canada
Manager, Performance & Reporting	Aviva Capital Management	Des Moines	IA	United States
Manager, Performance Analytics	Artisan Partners Limited Partnership	Milwaukee	WI	United States
Manager, Performance Reporting	American Century	Kansas City	MO	United States
Manager, Portfolio Accounting	Emerging Markets Management, LLC	Arlington	VA	United States
Marketing & Client Service Associate	Westfield Capital Management Co, LLC	Boston	MA	United States
Marketing and Client Service Advisor	Ann Pepper	Minneapolis	MN	United States
Marketing Manager	Baring Asset Management	Boston	MA	United States
Marketing Specialist	World Asset Management	Birmingham	MI	United States
Operations Administrator	Whitnell & Co.	Oak Brook	IL	United States
Paralegal	Ariel Capital Management, LLC	Chicago	IL	United States
Partner	Ashland Partners	Medford	OR	United States
Partner	Ashland Partners & Company LLP	Lavinia	TN	United States
Performance & Analytics Specialist	Metropolitan Capital Management	Newport Beach	CA	United States
Performance Analysis Supervisor	RS Investments	San Francisco	CA	United States
Performance Analyst	Palisade Capital Management	Fort Lee	NJ	United States
Performance Analyst	Baring Asset Management	Boston	MA	United States
Performance Analyst	William Blair	Chicago	IL	United States

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Performance Analyst	Rainier Investment Management	Seattle	WA	United States
Performance Analyst	Voyageur Asset Management	Minneapolis	MN	United States
Performance Analyst	Mellon Capital Management	San Francisco	CA	United States
Performance Analyst	JPMorgan Asset Management	New York	NY	United States
Performance Analyst	UBS Global Asset Management	Chicago	IL	United States
Performance Analyst	Metropolitan West Asset Management, LLC	Los Angeles	CA	United States
Performance Analyst	Connor, Clark & Lunn Financial Group	Vancouver	BC	Canada
Performance Analyst	New Brunswick Investment Management Corporation	Fredericton	NB	Canada
Performance Analyst	Burgundy Asset Management Ltd.	Toronto	ON	Canada
Performance Analyst	RS Investments	San Francisco	CA	United States
Performance Analyst	Analytic Investors	Los Angeles	CA	United States
Performance Analyst	Transamerica Investment Management, LLC	Los Angeles	CA	United States
Performance Analyst	Security Global Investors	Topeka	KS	United States
Performance Analyst	Nordea/Investment Management	Copenhagen		Denmark
Performance Analyst	Wasatch Advisors, Inc.	Salt Lake City	UT	United States
Performance Manager	Ariel Capital Management, Inc.	Chicago	IL	United States
Performance Manager		San Francisco	CA	United States
Performance Manager	AEGON USA	Cedar Rapids	IA	United States
Performance Manager	HighMark Capital Management	San Francisco	CA	United States
Performance Manager	PPM America	Chicago	IL	United States
Performance Manager	Fifth Third Asset Management	Cincinnati	OH	United States
Performance Measurement Analyst	Standard Life	Montreal	QC	Canada
Performance Measurement Manager	William Blair & Company	Wheaton	IL	United States
Performance Measurement Manager	ICON Advisers	Greenwood Village	CO	United States
Performance Reporting Manager	Driehaus Capital Management	Chicago	IL	United States
Performance Team Leader	Brandes Investment Partners, LP	San Diego	CA	United States
Portfolio Accountant		Arlington	VA	United States
Portfolio Manager	First Trust Advisors L.P.	Downers Grove	IL	United States
President	Dabney Investment Consulting Associates, Inc.	Houston	TX	United States
Project Manager for Compliance	GE Asset Management	Stamford	CT	United States
Results Specialist	The Capital Group	Atlanta	GA	United States
RFP Coordinator	Payden & Rygel	Los Angeles	CA	United States
Risk Analyst	MEAG New York Corporation	New York	NY	United States
Risk/Performance	Morgan Stanley	New York	NY	United States
Sales Engineer	BNY Mellon Asset Servicing	Boston	MA	United States
Senior Accountant	Blavin & Company	Scottsdale	AZ	United States
Senior Advisor (Performance)	Caisse de Depot et Placement du Quebec	Montreal	QC	Canada
Senior GIPS Analyst	Prudential Financial	Newark	NJ	United States
Senior Global Compliance Manager	Wellington Management Company	Boston	MA	United States
Senior Investment Analytics Consultant	BNY Mellon Asset Servicing	Tacoma	WA	United States
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Senior Manager	Ashland Partners	Medford	OR	United States
Senior Manager	Deloitte	Toronto	ON	Canada
Senior Manager	Deloitte & Touche LLP	Chicago	IL	United States
Senior Manager	PricewaterhouseCoopers LLP	Pittsburgh	PA	United States
Senior Performance Analyst	MFC Global Investment Management (U.S.)	Boston	MA	United States
Senior Performance Analyst	Charles Schwab Investment Management Inc.	South San Francisco	CA	United States
Senior Performance Analyst	HighMark Capital Management	San Francisco	CA	United States
Senior Performance Analyst	Connor, Clark & Lunn Financial Group	Vancouver	BC	Canada
Senior Performance Analyst	HSBC Investments	New York	NY	United States
Senior Performance Analyst	Fifth Third Asset Management	Cincinnati	OH	United States
Senior Performance Analyst	Harris Associates L.P.	Chicago	IL	United States
Senior Verifier	Ashland	Medford	OR	United States
Senior Vice President	Lazard Asset Management	New York	NY	United States
Senior Vice President	Dana Investment Advisors	Brookfield	WI	United States
Sr. Institutional Investment Analyst	Fidelity Investments Canada Limited	Toronto	ON	Canada
Sr. Performance Associate	Heitman, LLC	Chicago	IL	United States
Sr. Project Manager, Portfolio Accounting	First Quadrant	Pasadena	CA	United States
Team Leader, Investment Finance and Corporate Services	New Brunswick Investment Management Corporation	Fredericton	NB	Canada
Trader	Savant Capital Management	Rockford	IL	United States
Verification Associate	Beacon Verification	Chattanooga	TN	United States
Verification Associate	Beacon Verification	Chattanooga	TN	United States
Vice President	Comerica Asset Management	Detroit	MI	United States
Vice President	D3, Design Develop Deploy Financial Counselors	Downers Grove	IL	United States
Vice President	Independence Investments	Boston	MA	United States
Vice President	Heitman, LLC	Chicago	IL	United States
Vice President	Eaton Vance Management	Boston	MA	United States
Vice President	AllianceBernstein	White Plains	NY	United States
Vice President	AIG Investments	New York	NY	United States
Vice President		Ridgefield	CT	United States
Vice President	Pathway Capital Management, LLC	Irvine	CA	United States
Vice President	Frost National Bank	San Antonio	TX	United States
Vice President	Goldman Sachs	New York	NY	United States
Vice President	Wellington Management Company	Boston	MA	United States
Vice President	MGL Consulting Corporation	The Woodlands	TX	United States
Vice President	Hartford Investment Management Company	Marshfield	MA	United States
Vice President	LaSalle Investment Management	Chicago	IL	United States
Vice President and Assistant Counsel	OppenheimerFunds, Inc.	New York	NY	United States
Vice President Client Administration	Fiduciary Asset Management	St. Louis	MO	United States
Vice President Finance and Operations	Tetrem Capital Management Limited	Winnipeg	MB	Canada
Vice President Systems and Portfolio Administration	Sionna Investment Managers Inc	Toronto	ON	Canada

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Vice President, Client Reporting	RREEF	Chicago	IL	United States
Vice President, Compliance	Northern Trust Global Investments	Chicago	IL	United States
Vice President, Compliance Director	Atlanta Capital Management Company	Atlanta	GA	United States
Vice President, Investment Operations	Prudential Real Estate Investors	Parsippany	NJ	United States
Vice President, Law and Chief Compliance Officer	Manulife Financial	Toronto	ON	Canada
Vice President, Performance	Natixis Global Associates	Boston	MA	United States
Vice President, Performance Measurement	Cohen and Steers Capital Management Inc.	New York	NY	United States
Vice President, Performance Reporting and Analysis	Prudential Fixed Income	Succasunna	NJ	United States
Vice-President, Finance & Administration & CFO	Cardinal Capital Management, Inc.	Winnipeg	MB	Canada
	Deloitte & Touche LLP	Boston	MA	United States

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