



Due Diligence Meeting Agenda

Sands Capital Management

1000 Wilson Boulevard, Suite 3000 • Arlington, Virginia 22209

THURSDAY, NOVEMBER 3, 2022

2:30 pm	Introduction Ben Alge, CFA, <i>Divisional VP – East, Touchstone Investments</i>
2:30 – 3:00 pm	Distinctively Active Blake Moore, <i>President & CEO, Touchstone Investments</i> Mary Mock, <i>SVP and Head of Distribution, Touchstone Investments</i>
3:00 – 3:30 pm	Market Overview Richard “Crit” Thomas, CFA, CAIA, <i>Global Market Strategist, Touchstone Investments</i>
3:30 – 4:15 pm	Sands Capital Portfolio Manager Panel Kevin Murphy, CFA, <i>Senior Director, Client Relations, PM</i> Wesley Johnston, CFA, <i>Select Growth PM</i> Danielle Menichella, CFA, <i>International Growth PM</i> Neil Kansari, <i>Emerging Markets Growth PM</i>
4:15 – 4:25 pm	Break
4:25 – 5:10 pm	Navigating Fixed Income in a Challenging Environment Erik Aarts, CIMA, <i>Senior Fixed Income Strategist, Touchstone Investments</i> Art DeGaetano, <i>Touchstone Flexible Income Fund PM, Bramshill Investments</i>
5:30 pm	Bus Departs for Dinner at The Palm
6:00 pm	Dinner at The Palm 1225 19th St NW, Washington, DC 20036
	Bus will pick up at the Palm and drop off at Le Meridien



Due Diligence Meeting Agenda

FRIDAY, NOVEMBER 4, 2022

7:00 – 7:45 pm	Breakfast at Le Meridien – Amuse Restaurant 1121 19th Street North, Arlington, VA 22209
8:00 – 8:30 am	Active Share and Skill, Conviction, Opportunity, Patience and Expenses Tim Paulin, CFA, Sr. Vice President, Investment Research, Touchstone Investments
8:30 – 9:15 pm	Capitalizing on Two Market Inefficiencies: Time and Risk Stephen Goddard, CFA, Founder, Chairman, CIO, and Co-Lead PM, Mid Cap Brian Campbell, CFA, Principal, Co-Lead, PM Mid Cap Steve Owen, CFA, Principal, Chief Executive Officer The London Company
9:15 – 9:30 am	Break
9:30 – 10:00 am	What's Next in Healthcare and Life Sciences Jennifer Goldsmith, CFA, Sr. Research Analyst & Director Research Associate Program Daniel Cheng, Sr. Research Analyst Sands Capital Management
10:00 – 10:30 am	The Economics and Future of the Sharing Economy Katherine Okon, Research Analyst, Sands Capital Management
10:30 – 11:00 am	The Future of Computing: Implications For Growth Investors Daniel Pilling, Sr. Research Analyst, Sands Capital Management
11:00 – 11:05 am	Break
11:10 – 11:55 am	Targeted Client Acquisition Anthony Cassino, Former Navy SEAL
11:55 – 12:00 pm	Summary Mary Mock, SVP and Head of Distribution, Touchstone Investments
12:00	Lunch Dine-Arounds