



# Touchstone Active Management Academy

The University of Notre Dame • Mendoza College of Business  
Embassy Suites by Hilton South Bend at Notre Dame

## THURSDAY, OCTOBER 26, 2023

4:00 – 5:30 pm <i>Embassy Suites Lobby</i>	Campus Tour (Optional)
6:00 pm – 9:00 pm <i>Foley's</i> <i>2010 Moose Kraus Circle</i>	<b>Welcome Reception and Dinner at Foley's</b> <i>Foley's is located in the in O'Neill Hall Notre Dame Stadium</i> <ul style="list-style-type: none"> <li>6:00 pm Reception</li> <li>7:00 pm Dinner</li> </ul>

## FRIDAY, OCTOBER 27, 2023

6:30 – 8:00 am <i>Embassy Suites</i>	<b>Breakfast</b> <i>Complimentary made-to-order breakfast near the lobby &amp; kitchen area</i>
8:00 – 8:20 <i>Stayer Center</i> <i>Commons A &amp; B</i>	<b>Welcome to Active Management Deconstructed</b> <ul style="list-style-type: none"> <li>Blake Moore, <i>President and CEO, Touchstone Investments</i></li> <li>Mary Mock, <i>Senior Vice President, Head of Distribution, Touchstone Investments</i></li> </ul>
8:20 – 10:00	<b>Active Share and the Three Pillars of Active Management</b> Skill, Conviction, Opportunity and Integrating Patience, Expenses and Active Fees <ul style="list-style-type: none"> <li>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></li> </ul>
10:00 – 10:10	<b>Group Photo / Break</b>
10:10 – 11:00	<b>Practical Application of Active Share and SCOPE</b> 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"> <li>Tim Paulin</li> </ul>
11:00 – 12:00 pm	<b>Hands-On Workshop</b> Evaluating Funds using Active Share and SCOPE <ul style="list-style-type: none"> <li>Tim Paulin</li> <li>Martijn Cremers</li> </ul>
12:00 – 1:00	<b>Lunch Session: SCOPE in Action</b> An Interview with Jamie Wilhelm, PM of Touchstone Large Cap Focused Fund <ul style="list-style-type: none"> <li>Mary Mock</li> <li>Jamie Wilhelm, <i>Managing Director, Fort Washington Investment Advisors</i></li> </ul>
1:00 – 1:50	<b>Challenging the Conventional Wisdom on Active Management</b> Highlights of the Past 20 Years of Academic Literature <ul style="list-style-type: none"> <li>Timothy B. Riley, <i>Sam M. Walton College of Business, University of Arkansas</i></li> </ul>
1:50 – 2:00	<b>Break</b>
2:00 – 2:50	<b>Applying Three-Lens Evaluation to your Fund Roster</b> Overcoming the typical pitfalls of fund evaluation based on recent performance <ul style="list-style-type: none"> <li>Ben Alge, <i>Eastern Division Vice President, Touchstone Investments</i></li> <li>Tom Singler, <i>Manager, Investment Strategy Specialist, Touchstone Investments</i></li> </ul>
2:50 – 3:00	<b>Wrap-up</b> <ul style="list-style-type: none"> <li>Blake Moore</li> </ul>