



Touchstone Active Management Academy

The University of Notre Dame | Mendoza College of Business
The Stayer Center | 100 Stayer Center, Notre Dame, IN 46556
The Morris Inn | 1399 N Notre Dame Ave, South Bend, IN, 46617

MONDAY, SEPTEMBER 30, 2024

1:30 – 1:45 pm <i>Stayer Center, Commons A/B</i>	Welcome to Active Management Academy	Ben Alge, CFA <i>President, Touchstone</i> Mary Mock <i>SVP, Head of Distribution, Touchstone</i>
1:45 – 3:15 pm	Active Share and the Three Pillars of Active Management Skill, Conviction, Opportunity and Integrating Patience, Expenses and Active Fees	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>
3:15 – 3:35 pm	Group Photo / Break	
3:35 – 4:30 pm	Challenging the Conventional Wisdom on Active Management Highlights of the Past 20 Years of Academic Literature	Timothy B. Riley <i>Sam M. Walton College of Business, University of Arkansas</i>
4:50 – 6:15 pm	Optional Tour of Notre Dame Campus Tour attendees meet in Lobby of Morris in at 4:50 pm, tour will end at the Downes Club in time for the reception	
6:15 pm – 9:00 pm <i>Downes Club at Corbett Family Hall, 7th floor</i>	Welcome Reception and Dinner overlooking Notre Dame Stadium 6:15 pm Reception 7:00 pm Dinner	

TUESDAY, OCTOBER 1, 2024

7:00 – 8:00 am <i>Morris Inn</i>	Breakfast, on your own <i>Voucher for hotel restaurant or café given at check-in</i>	
8:00 – 8:50 am <i>Stayer Center, Commons A/B</i>	From Academic to Application Application of concepts explored in academic literature with practical techniques to improve active manager evaluation and selection	Tim Paulin, CFA <i>Sr. VP, Research & Product, Touchstone</i> Brad Watterson, CFA <i>AVP Investment Research, Touchstone</i>
8:50 – 10:00 am	Hands-On Workshop Evaluating Funds using Touchstone's Three Lens Methods	
10:00 – 10:10 am	Break	
10:15 – 11:00 am	Fort Washington Investment Advisors: Touchstone Small Company Fund	Jason Ronovech, CFA <i>VP & Sr. Portfolio Manager, FWIA</i> Will Kussin <i>Managing Regional Vice President, Touchstone</i>
11:00 – 11:45 am	The London Company: Touchstone Mid Cap Fund	Mark DeVaul, CFA, CPA <i>Principal, Portfolio Manager, TLC</i> Tim Bray <i>Divisional Vice President, Touchstone</i>
11:45 – 12:00 pm	Break	
12:00 – 12:50 pm <i>Working Lunch</i>	Applying Three-Lens Evaluation to Your Fund Roster Overcoming the typical pitfalls of fund evaluation based on recent performance	Ben Alge, CFA <i>President, Touchstone</i>
12:50 – 1:00 pm	Wrap-up	Mary Mock <i>SVP, Head of Distribution, Touchstone</i>