



Fixed Income Sales Manager Roundtable

Thursday, April 25

2:00-5:30pm CT

FTN Financial

Memphis, TN

Agenda

2:00pm-2:05pm

Welcome and Introductions

Brett Bolton and Kelli McMorrow, BDA

2:05pm-3:00pm

Key Topics in Sales Management

Discussion Leader: Steve Pulley, Crews & Associates

Managers are facing many challenges in a rapidly changing sales environment from new regulations and rising costs in technology. What are firms doing to keep up in this changing environment?

- Continued rising costs in technology
- Increasing legal and compliance cost due to regulation
- Conducting business in an environment of tightening spreads
- Shrinking sell-side balance sheets and alternatives to hedge properly
- How to adapt business model for increasingly young buy-side clients

3:00pm – 3:55pm

Developing and Retaining a Talented Sales Force:

Discussion Leader: Mat Parker, Raymond James

Senior members of sales teams are closing in on retirement age and firms are struggling to attract and maintain millennial and diverse employees. How are firms adapting to the change? And what methods seem to be working in retention?

- Aging sales-force and how to transition
- Methods for engaging and increasing diversity in fixed income

- What are firms doing to ensure talent is well trained and ready to step into a more senior role?
 - What is working and what is not working?

3:55pm to 4:10pm - Break

4:10pm to 5:00pm

Technology and Sales:

Discussion Leader: Todd A. Shearer, Fifth Third Securities

As electronic trading continues to grow, what changes are sales managers making in order to keep up with the changes?

- What are impacts of electronic trading advances in the markets and spreads, transparency and liquidity
- How do you handle commissions/sales credits for trades that are done electronically?
- Exploring the shift in communication methods – how do your customers want to talk to you, and how do you adapt to add value?

5:00pm to 5:30pm

BDA Legislative and Regulatory Update

Discussion Leaders: Brett Bolton and Kelli McMorrow, BDA

- Legislative Update: What's happening on Capitol Hill

6:00pm-8:30pm

Dinner

McEwen's

120 Monroe Avenue

Memphis, TN