
The 4th Annual Money Management Letter Public Pension Fund Awards for Excellence
Cocktail Reception, Silent Auction, Ceremony and Dinner
Sunday • 6:00 p.m. • March 13th, 2005 • JW Marriott Desert Ridge Resort & Spa Phoenix

Previous Awards for Excellence Nominees Include

Public Plan Marketer of the Year:

2004

- **Jennifer Hunt**, Loomis, Sayles & Co.
- **Liz Smith**, Alliance Bernstein Institutional Investment Management

2003

- **Peter Anderson**, FTI Institutional
- **Chris Scibelli**, Metropolitan West Asset Management
- **Kevin Rockford**, Northern Trust Global Investment

Consultant of the Year:

2004

- **Michael Rosen**, Angeles Investment Advisors
- **Robin Pellish**, Rocaton Investment Advisors
- **Peter Gerlings**, New England Pension Consulting

2003

- **Janet Becker-Wold**, Callan Associates
- **Jay Long**, the Townsend Group
- **John Cardinali**, Evaluation Associates

Public Plan Sponsor of the Year:

2004

- **Tim Barrett**, San Bernardino County Employees' Retirement Association
- **Andrew Silton**, North Carolina Retirement System
- **Bill Atwood**, Illinois State Board of Investments

2003

- **Jon Bauman**, Illinois State Teachers Retirement
- **Bill Morris**, Colorado Fire & Police Pension Association
- **Robert Gish**, New Mexico Public Employees

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Previous Awards for Excellence Winners Include:

Lifetime Achievement Award

2004

Ron Ryan, Founder and President, Ryan Labs

Public Fund Marketer of the Year

2004

Jennifer Hunt, Loomis, Sayles & Co

2003

Peter Andersen, Director of Sales, FTI Institutional

Public Plan Sponsor of the Year

2004

Andrew Silton, Former Chief Investment Advisor, North Carolina Retirement Systems

2003

Jon Bauman, Executive Director, Illinois State Teachers Retirement System

Consultant of the Year

2004

Michael Rosen, Angeles Investment Advisors

2003

Janet Becker-Wold, Senior Consultant, Callan Associates

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Award Category Criteria

Plan Sponsor Awards

- ◆ **Lifetime Achievement Award** (awarded to individual). Based on contributions to the asset management industry. Someone who has made a massive impact not just at his or her firm but on the industry as a whole.
- ◆ **Large Public Plan of the Year** – based on investment performance, innovation, intelligent asset allocation and, if relevant, problem solving. For funds will assets over \$5 billion
- ◆ **Small Public Plan of the Year** - based on investment performance, innovation, intelligent asset allocation and, if relevant, problem solving. For funds will assets under \$5 billion
- ◆ **Investment Strategy Change of the Year** – a savvy and/or innovative asset allocation move
- ◆ **Public Plan Award for Investment Expertise** – a fund with an investment committee that really knows its stuff, is receptive to new ideas, understands investments and that asset managers and consultants find easy to work with.

Investment Manager Awards – based on performance, client service, low staff turnover

- ◆ **Equity Manager of the Year**
- ◆ **Fixed-income Manager of the Year**
- ◆ **Alternatives Manager of the Year**

Marketer (or marketing program) Award– based on assets gathered, client service, knowledge and understanding of the public fund market place

- ◆ **Public Plan Marketer of the Year**

Consultant Award– based on client service, knowledge and understanding of the public fund market place, advice that has enabled funds to improve their returns and innovation

- ◆ **Public Plan Consultant of the Year**

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2005 Dinner Advisory Board

To plan and execute this industry event, we will enlist the help of an advisory board. The advisory board is hand picked by the publishing staff of Institutional Investor News. Those invited to participate are individuals within the public pension fund and investment management communities who are recognized as industry movers and shakers. Please do not hesitate to contact Kendra Bahneman at 212-224-3239 or email: kbahneman@institutionalinvestor.com if you would like to be considered for the dinner advisory board.

Charity

We will hold a silent auction during the cocktail reception. All proceeds from the silent auction will be donated to a charity to be named.

Invited Guests

Public Pension Funds that are nominated will be invited to attend as guests of *Money Management Letter*.

About Money Management Letter

With over 25 years experience as the leading news bi-weekly of the pension fund asset management industry, *Money Management Letter* reports on pension fund asset allocation strategy and execution, money manager marketing moves, consultant issues, new product development, and general industry trends.

About Information Management Network

Information Management Network (IMN) is the market leader in organizing finance and investment conferences. Based in New York City, the company is in its tenth year of operations. Information Management Network was established to offer educational conferences of the highest quality for the global investment community. The company organizes roughly 70 conferences annually across the United States and throughout the world.