



VIRTUAL OPERATIONS CONFERENCE

COLLABORATE TO INNOVATE

APRIL 13-15 ■ APRIL 20-22



We will host a 6-session series of daily webinars, on Tuesdays–Thursdays, for two weeks, from April 13–April 22. Each webinar will be one hour, starting at 4:00 PM ET.

Tuesday, April 13
4:00 PM – 5:00 PM

Connecting the Dots Between Lenders and Admin Agents

Are you aware of settlement and servicing issues that affect how the primary and secondary market functions on a day-to-day basis? Listen as our panelists take a deep dive into concerns and questions raised on both sides of the aisle to walk a path to standardization and efficiency.

Moderator: [Ellen Hefferan](#), EVP of Operations and Accounting, LSTA

Speakers: [Steven Connolly](#), Executive Director, Head of North America Loan & Agency Operations, JP Morgan

[David Lee](#), Senior Analyst, Trading Operations, Fidelity Investments

[Elaine Mahon](#), Senior Principal, Bank Loans, Invesco

[Brian O’Neill](#), SVP, Group Operations Manager, Syndicated & Corporate Lending, Bank of America

Wednesday, April 14
4:00 PM – 5:00 PM

LIBOR Transition: This Is It!

Banking regulators have said new LIBOR loans must cease “as soon as practicable”, but definitely no later than 12/31/21. This means you’ll be doing post-LIBOR Ops in 6 months! Do you know how? This panel will discuss how to actually operationalize different post-LIBOR rates...all at the same time!

Moderator: [Meredith Coffey](#), EVP of Research & Public Policy, LSTA

Speakers: [Heather Bronson](#), SVP, Syndicated and Corporate Lending Operations Executive, Bank of America

[Maggie Klinedinst](#), Vice President, ISG Product Operations, Morgan Stanley

[Burke Malek](#), Managing Director and Chief Operating Officer, KKR Credit

Thursday, April 15
4:00 PM – 5:00 PM

Private Credit – Would Standards Be Helpful?

Should the private credit investment world continue to expand, will operational expertise and technology that is scalable and automated be required? Our panel will discuss recent trends in direct lending, offer comparisons to the syndicated loan market and determine if operational best practices and procedures would facilitate entry into this arena.

Moderator: [Ryan Morick](#), MD, AlterDomus

Speaker: [Rob Healey](#), Director, Credit Suisse Asset Management

[Jeremiah Loeffler](#), COO, Crestline Investors, Inc.

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Tuesday, April 20
4:00 PM – 5:00 PM

Operational Risk and Why We Need More Than *Cosmetic* Changes to Documents

Business managers must identify, own, and manage operational risks and the controls that mitigate the identified risks. This panel will explore those risks, considering recent events, and provide documentation, workflow and behavior changes to avoid operational losses.

Moderator: [Ellen Hefferan](#), EVP of Operations and Accounting, LSTA

Speakers: [Matthew James Moore](#), Director, Non-Financial Risk Management, Deutsche Bank
[Michael Richardson](#), VP, Senior Consultant, Alternative Asset Services, Northern Trust
[John Schmidt](#), Senior Vice President, Blackstone Credit

Wednesday, April 21
4:00 PM – 5:00 PM

Tech Terms Everyone Should Know...Translated Into English

Technology plays such a significant role in efficient operations; however, do you ever feel that you would benefit from a better understanding of technology concepts today? Join us as our speakers demystify technology for you, providing you with the tools to be part of the IT conversation.

Moderator: [Ellen Hefferan](#), EVP of Operations and Accounting, LSTA

Speakers: [Jason Boyer](#), Global Sales Enablement Manager for Lending, Finastra
[Nicole Henry](#), VP, Client Development, Loan Ecosystems LLC
[Dr. Lewis Z. Liu](#), Co-founder and CEO, Eigen Technologies

Thursday, April 22
4:00 PM – 5:00 PM

CLO Compliance – Operational Focus in 2021

The CLO market entered 2021 with a full head of steam. The post-COVID market has primed an environment ready for new issuance, refis and resets. How can the impact of LIBOR transition and new technology solutions help participants scale their back office? Our panelists will discuss these topics and how best to navigate the CLO market in 2021.

Moderator: [Mark Bennett](#), Head of CLO Compliance Analytics, IHS Markit

Speaker: [Thomas Gough](#), Managing Director, Head of Portfolio Control, CIBC Asset Management
[Tracey Luttenegger](#), CLO Compliance Product Manager, IHS Markit
[Alison McDevitt](#), Loan Operations Manager, Shenkman Capital Management
[Lauren Schultz](#), Director of Portfolio Operations, AIG Credit Management

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