

## E-Business Exchange & WebMonitor User Group Meeting Preliminary Agenda for June 9 & 10, 2010

### Wednesday, June 9<sup>th</sup> – Welcome Dinner

**6:00 pm**      **TBD**

### Thursday, June 10<sup>th</sup> – NEW ENGLAND Room, 4<sup>th</sup> Floor

8:30 Meeting room open for breakfast and conversation		
9:00	<p><b>WELCOME AND MEMBER EXCHANGE</b></p> <ul style="list-style-type: none"> <li>Recent Accomplishments</li> <li>Current and Immediate Issues</li> <li>Other Concerns and Challenges</li> </ul>	<p><b>ALL MEMBERS – PLEASE BE PREPARED TO DISCUSS</b></p>
10:00	<p><b>SESSION 1</b></p> <ul style="list-style-type: none"> <li>The New Web: DALBAR takes a look at the current online environment following 2008-2009's economic meltdown and how firm's have adapted via their websites. We will also explore other significant changes and trends on websites found over the past year and a half.</li> </ul>	<p><b>JARED LICKLIDER, DALBAR, INC.</b></p>
10:40 – 11:00 Break		
11:00	<p><b>SESSION 2</b></p> <ul style="list-style-type: none"> <li>Kevin McMahon from John Hancock Funds will discuss online resources available to advisors, focusing on portfolio tools and the firm's unique Client Connections tools.</li> </ul>	<p><b>KEVIN MCMAHON, JOHN HANCOCK FUNDS</b></p>
12:15 Lunch		
1:15	<p><b>SESSION 3</b></p> <ul style="list-style-type: none"> <li>The Growing World of Apps: Applications for mobile devices, most notably the Apple iPhone, have become extremely popular. The financial services industry is joining in and many firms are creating apps to help manage finances. DALBAR examines the development and usefulness of these mobile apps.</li> </ul>	<p><b>JARED LICKLIDER, DALBAR, INC.</b></p>
1:45	<p><b>OPEN FORUM – BOARD MEMBER DIALOGUE</b></p> <ul style="list-style-type: none"> <li>Topics of interest to members are discussed</li> </ul>	<p><b>ALL MEMBERS</b></p>
3:00 Adjourn		

**\* Preliminary agenda – Presentations & presenters are subject to change**