

# 2010 Bonus Distribution

Conference/Telephone/URL	Date	Location
IMCA Consultants Conference (303) 850.3062 • www.imca.org	January 11-13	New York, NY
FSI Broker-Dealer Conference (888) 373.1840 • www.financialservices.org	January 25-27	New Orleans, LA
TD Ameritrade (800) 934.6124 • www.tdaconferences.com	February 3-5	Orlando, FL
IRI (NAVA) Marketing (703) 707.8830 • www.navanet.org	February 21-23	New York, NY
IMCA Consultants Specialty (303) 850.3062 • www.imca.org	February 22-23	Scottsdale, AZ
FPA/InvestmentNews Technology Expo and Business Solutions Conference (800) 322.4237 • www.fpanet.org	March 1-2	Dallas, TX
ABA Wealth Management and Trust (800) BANKERS • www.aba.com	March 7-9	Phoenix, AZ
RIIA: Retirement Income Architecture (617) 342.7390 • www.riia-usa.org	March 22-23	Chicago, IL
Lipper Fund Awards (877) 955.4773 • www.lipperweb.com	March 24	New York, NY
InvestmentNews Retirement Income Summit (212) 210 0774 • www.investmentnews.com/summit	May 3-4	Chicago, IL
NAAIM National (888) 261.0787 • www.naaim.org	TBD	TBD
Investment Company Institute (202) 326.5800 • www.ici.org	May 5-7	Washington, D.C.
IMCA Annual Conference (303) 850.3062 • www.imca.org	May 17-19	Orlando, FL
NAPFA National (847) 483.5400 • www.napfa.org	May 17-21	Chicago, IL
MMI (202) 822.4949 • www.moneyinstitute.com	May 19-20	New York, NY
Pershing INSITE 2010 (201) 413.4746 • www.pershingconference.com	June 9-11	Hollywood, FL
SIFMA Technology Management Conference (212) 608.1500 • www.sifma.com	June 22-24	New York, NY
Morningstar (312) 696.6066 • www.morningstaradvisor.com	June 23-25	Chicago, IL

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Conference/Telephone/URL	Date	Location
ABA Advanced Trust Forum (800) BANKERS • www.aba.com	TBD	TBD
NAIFA Annual (703) 770.8195 • www.naifa.org	September 11-15	Seattle, WA
NAPFA West (847) 483.5400 • www.napfa.org	September 20-24	San Diego, CA
RIIA Annual Meeting & Awards Dinner (617) 342.7390 • www.riia-usa.org	TBD	TBD
Center for Due Diligence (CFDD) (630) 662.0284 • www.401kduediligence.com	October 6-8	Chicago, IL
FPA Annual 2010 (800) 322.4237 • www.fpanet.org	October 9-12	Denver, CO
IRI (NAVA) Annual (703) 707.8830 • www.navanet.org	October 24-26	Chicago, IL
Schwab IMPACT 2010 (888) 673.4446 • www.impact.schwab.com	October 26-29	Boston, MA
NAPFA Northeast/Mid-Atlantic (847) 483.5400 • www.napfa.org	November 2-5	Boston, MA

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