



Greater Cincinnati Mutual Funds Association

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GCMFA Developments in Fund Technology & Cryptocurrency

Monday, March 5, 2018

4:30 PM

MadTree Brewing Company
3301 Madison Road • Cincinnati, Ohio 45209

Scott Schulenburg, Senior Vice President & Director of Transfer Agency, UMB Fund Services, will give a presentation on Cybersecurity & Technology Investments. Scott oversees the Investor Services & Transfer Agency functions for UMB Fund Services. UMB Fund Services provides a broad array of services for mutual funds and alternative investments – as well as turnkey solutions including series trust, collective trust, ETF trust, registered closed end, and closed end interval products.

Will Coleman, Director, Technology Advisory Services, Cohen & Co., will have a fireside chat on the topic of Understanding Cryptocurrency as an Asset Class. With a career spanning more than 20 years, Will serves as a technology consultant to clients on issues ranging from information technology security and controls, to big data and artificial intelligence, to cryptocurrency funds. He leads the team that designs customized systems for clients, including producing investment portfolio statements, creating Schedule K-1 packages and checking transactions for conflicts of interest to support Section 206(3) of the Investment Advisers Act of 1940. In the cryptocurrency space, Will has been instrumental in helping the firm design and implement programs to audit and support these specific funds. He also works with cryptocurrency managers and their service providers to help ensure their operations are set up properly from a technology and controls perspective.

The Seminar is open to all employees in your organization, a benefit of your membership and participation in the Greater Cincinnati Mutual Funds Association.

Please forward this notice to other associates who may benefit from participation (i.e. portfolio management, call center & transfer agent teams, marketing department, etc.)

Attending a GCMFA event provides financial professionals continuing education and the opportunity to interact and network with their peers who face the same daily challenges.

Program is Free to GCMFA members!

\$100 non-member fee.

Attendance is limited to 100 people

Deadline for Reservations: February 27, 2018