

Madison Investment Support



Investment Committee Meeting

FREQUENCY:	Monthly
MADISON OWNER:	Annick Donat
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing



DAA Dashboard, Presentation, Positions relative to Clime “reference portfolio”

FREQUENCY:	Quarterly
MADISON OWNER:	Greg Dawes/Andrea Theouli
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing



APL Management

FREQUENCY:	Monthly
MADISON OWNER:	Andrea Theouli
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing



Quarterly Adviser Webinars

FREQUENCY:	Quarterly
MADISON OWNER:	Madeleine Faulkner / Andrea Theouli
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing



FE Monthly Reporting

FREQUENCY:	Monthly
MADISON OWNER:	Andrea Theouli
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing



FE Quarterly Reporting

FREQUENCY:	Quarterly
MADISON OWNER:	Andrea Theouli
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing



Strategic Research Papers

FREQUENCY:	
MADISON OWNER:	Greg Dawes
MERCER OWNER:	Rebecca Jacques / Emma Potocki / Jack Clarke
LAST:	Ongoing

Madison Investment Support

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Investment Committee Meeting												
DAA Dashboard, Presentation, Positions relative to Cline “reference” portfolio												
APL Management												
Quarterly Advisor Webinars												
FE Monthly Reporting												
FE Quarterly Reporting												
Strategic Reserach Papers												