

# Money Fund Symposium

An educational event for money market mutual fund professionals and investors



**June 23-25, 2025 • The Renaissance Boston Seaport • Boston, Mass.**

Dear Money Fund & Cash Investment Professional:

Please join us for Crane Data's 17th annual *Money Fund Symposium*, which will take place June 23-25, 2025, in Boston!

We attracted a record 585 attendees to Pittsburgh for our 2024 show, and we expect to break 600 with our 2025 show in Boston. See you in Boston in June! - *Pete Crane, Crane Data*

## Crane's Money Fund Symposium Conference Agenda

### Monday, June 23

1:00-1:15pm **Welcome to Money Fund Symposium 2025**

*Peter Crane, President, Crane Data*

1:15-2:00pm **Keynote: Money Market Funds Bigger Than Ever**  
*Yie-Hsin Hung, President & CEO, State Street Global Advisors*

2:00-2:50pm **Tokenized MMFs, Stablecoins & MM ETFs**

*Adam Ackermann, Head of Portfolio Management, Paxos*

*Teresa Ho, Managing Director, J.P. Morgan Securities*

*BlackRock Speaker TBD*

2:50-3:20pm **Refreshments** sponsored by *Fidelity Investments*

3:20-4:10pm **Repo, Fed RRP & Treasury Clearing Issues**

*Travis Keltner, Managing Director, State Street*

*Dina Marchioni, Director of MM, Federal Reserve Bank of NY*

*Nathaniel Wuerffel, Head of Market Structure, BNY*

4:10-5:00pm **Major Money Fund Issues 2025**

Moderator: *Peter Crane, President, Crane Data*

*Laurie Brignac, MD & Senior PM, Invesco*

*Kevin Gaffney, Money Markets CIO, Fidelity Investments*

*Dan LaRocco, Head of US Liquidity, Northern Trust A.M.*

5:00-6:00pm **Reception**

sponsored by *State Street*

### Tuesday, June 24

8:00-9:00am **Breakfast** sponsored by *J.P. Morgan*

9:00-9:50am **Strategists Speak '25: Fed, Rates & More Repo**

*Joseph Abate, MD F-I Strategy, Barclays*

*Mark Cabana, MD, Head of US Rates Strategy, BofA Securities*

*Gennadiy Goldberg, MD, Head of Rates Strategy, TD Securities*

9:50-10:40am **Senior Portfolio Manager Perspectives**

Moderator: *Peter Crane, President, Crane Data*

*Doris Grillo, Managing Director, J.P. Morgan Asset Mgmt.*

*Nafis Smith, Principal, Head of Taxable MMkts, Vanguard*

*John Tobin, Chief Investment Officer, Dreyfus*

10:40-11:10am **Coffee** sponsored by *Bank of Montreal*

11:10-11:50am **Treasury & Government Money Fund Issues**

*Tom Katzenbach, Deputy Director ODM, US Dept of Treasury*

*Lynn Paschen, Senior Portfolio Manager, Schwab Asset Mgmt*

11:50-12:30pm **Muni & Tax Exempt Money Fund Update**

*David Elmquist, Executive Director, J.P. Morgan Securities*

*Cameron Ulliyatt, Senior PM, Charles Schwab Inv. Mgmt.*

*John Vetter, Structured Analyst, Fidelity Investments*

12:30-1:30pm **Lunch** sponsored by *Dreyfus*

1:30-2:15pm **Dealer's Choice: Supply, New Securities & CP**  
Moderator: *Rob Sabatino, Global Liquid Head PM, UBS A.M.*

*Rob Crowe, Managing Director, Citi Global Markets*

*Stewart Cutler, Head of Origination, Barclays*

*John Kodweis, Managing Director, J.P. Morgan Securities*

2:15-3:00pm **Local Government Investment Pool Briefing**

*Laura Glenn, Senior Director, Public Trust Advisors*

*Marty Margolis, Founder, Public Funds Investment Institute*

*Jeffrey Rowe, Managing Director, PFM Asset Management*

3:00-3:30pm **Break** sponsored by *Invesco*

3:30-4:20pm **Deposits, Brokerage Sweeps & Retail Cash**

*Michael Berkowitz, MD, Citi Treasury & Trade Solutions*

*Chris Melin, Director Cash Products, Ameriprise Financial*

4:20-5:10pm **Investors, Portals & Distribution Topics**

*Vanessa McMichael, Director, Wells Fargo Securities*

*Greg Fortuna, Head of GlobalLink, State Street*

5:10-6:10pm **Reception**

sponsored by *Barclays*

### Wednesday, June 25

8:00-9:00am **Breakfast** sponsored by *Nearwater Capital*

9:00-9:50am **Regulations: Money Fund Reforms' Aftermath**

*Brenden Carroll, Partner, Dechert LLP*

*Jon-Luc Dupuy, Partner, K&L Gates LLP*

*Jamie Gershkow, Partner, Stradley Ronon*

9:50-10:40am **Ratings Agency Outlook & Trend Review**

*Robert Callagy, Associate MD Financial Insts, Moody's Ratings*

*Peter Gargiulo, Senior Director, Fitch Ratings*

*Michael Masih, Director, S&P Global Ratings*

10:40-11:10am **Coffee** sponsored by *Moody's Ratings*

11:10-12:00pm **State of the Money Market Fund Industry**

*Peter Crane, President, Crane Data*

*Pia McCusker, Head of MM, State Street Global Advisors*

12:00-12:30pm **Money Fund Wisdom Demo & Training**

*Peter Crane, President, Crane Data*

## Money Fund Symposium Sponsors & Exhibitors

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## Money Fund Symposium

Thanks to our 2025 Sponsors!



Money Fund Symposium 2026 June 24-26, 2026 Jersey City, NJ



### Crane Data

measures money and provides competitive intelligence on money markets & mutual funds.

Crane Data was founded by money fund expert Peter G. Crane and computer & statistics guru Shaun Cutts.

*Our mission is faster, cheaper, and cleaner market information.*

#### Crane Data

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### About The Renaissance Boston Seaport

The Renaissance Boston Seaport Hotel is in the Boston Seaport District, offering easy access to the Financial District, Quincy Market, and Faneuil Hall. Next to Boston Harbor, the hotel provides guests with an unparalleled level of service and sophisticated accommodations. Visit [www.cranesmf Symposium.com/hotel-and-travel](http://www.cranesmf Symposium.com/hotel-and-travel) to reserve a room or call 617-338-4111. The rate is good until the room block sells out or until May 23, 2025. Availability and rate cannot be guaranteed after this date. (Please stay at the conference hotel and let them know you're attending Crane's Money Fund Symposium.) Visit [www.moneyfundsymposium.com](http://www.moneyfundsymposium.com) for more, or contact Peter Crane (508-439-4419; [pete@cranedata.com](mailto:pete@cranedata.com)) or Devon Binder at Red Door Alliances (303-946-2522; [devon@reddooralliances.com](mailto:devon@reddooralliances.com)) with any questions or requests.

