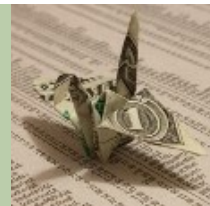


# Money Fund Symposium

THE event for money market mutual fund professionals and cash investors.



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

Dear Money Fund & Cash Investment Professional:

Mark your calendars for Crane Data's 17th annual *Money Fund Symposium*, scheduled for June 23-25, 2025, in Boston!

We attracted a record 580 attendees to Pittsburgh for our 2024 show, and we expect to break 600 with our 2025 show in Boston. We hope you'll join us 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: Will the Money Fund Party Keep Going?**

*Yie-Hsin Hung, President & CEO, State Street Global Advisors*

2:00-2:50pm **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 Mellon*

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

3:20-4:10pm **New Frontier: Tokenized MMFs & MM ETFs**

*Adam Ackermann, Head of Portfolio Management, Paxos*

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

*BlackRock Speaker TBD*

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*

*John Tobin, Chief Investment Officer, Dreyfus*

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

sponsored by *Fidelity Investments*

### Tuesday, June 24

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

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

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

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

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

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

Moderator: *Peter Crane, President, Crane Data*

*Deborah Cunningham, MM CIO, Federated Hermes*

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

10:40-11:10am **Coffee** sponsored by *Nearwater Capital*

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

*Mike Bird, Senior PM, Allspring Global Investments*

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

*Nafis Smith, Principal, Head of Money Mkts, Vanguard*

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

*Cameron Ulyatt, Senior Portfolio Mgr, Schwab Asset Mgmt*

*John Vetter, Structured Analyst, Fidelity Investments*

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

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*

*Jeffrey Rowe, Managing Director, PFM Asset Management*

*Additional Speaker TBD*

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

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

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

*Additional Speaker TBD*

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

*Vanessa McMichael, Director, Wells Fargo Securities*

*Greg Fortuna, Head GlobalLink F-I, State Street Fund Connect*

5:20-6:00pm **Reception**

sponsored by *Barclays*

### Wednesday, June 25

8:00-9:00am **Breakfast** sponsored by *Federated Hermes*

9:00-9:50am **Regulations: Money Fund Reforms Round III**

*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, VP/Sr Analyst, Moody's Investors*

*Peter Gargiulo, Senior Director, Fitch Ratings*

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

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

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**

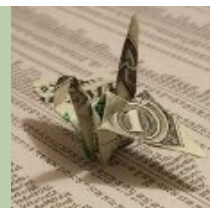
*Peter Crane, President, Crane Data*

## Money Fund Symposium Sponsors & Exhibitors

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



## Money Fund Symposium Thanks to our 2024 Sponsors!



**Money Fund Symposium 2025**

**June 23-25, 2025**

**Boston, Mass.**



### 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.*

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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.cranesmfssymposium.com/hotel-and-travel](http://www.cranesmfssymposium.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 20, 2024**. 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.

