



*Creating a more informed, transparent, and integrated investment community.*

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**Our mission is to share research and education to support better investment outcomes for the beneficiaries we all serve.**

**The Callan Institute produces practical, industry-focused content to help you make more confident decisions.**



*Research is the foundation of all we do at Callan, and sharing our best thinking with the investment community is our way of helping to foster dialogue to raise the bar across the industry.*

– Greg Allen  
CEO AND CHIEF RESEARCH OFFICER

## High-Quality Research, Education, and Events for All Institutional Investors

Research and education have always been at the heart of our consulting business. When we launched the Callan Institute in 1980, it became the first forum to provide research and education to the institutional investment community. The Institute has evolved into an industry-leading, broadcast engine for practical, industry-focused content produced by Callan's research professionals throughout the year.

Whether you are an experienced fiduciary or an investment professional just getting started, the Callan Institute is a resource for institutional investors from all backgrounds.

### Institute Events

Each year the Institute offers live events, workshops, and webinars for our clients. These offerings include our National Conference, workshops in Spring and Fall, and the Fall Investment Manager Conference in September.

### “Callan College”

The “Callan College” provides basic-to-intermediate-level instruction for individuals who participate in the investment decision-making process. Delivered by Callan experts, these educational sessions give all financial professionals and fiduciaries access to a robust educational curriculum.

### Master Classes

In-depth, practical education on topics of interest to investment management professionals.

Hosted by Callan's Institutional Consulting Group.

### Market Intelligence

Callan's Market Intelligence Report is a look at expected institutional investor asset allocation and investment structure changes. The report is based on our quarterly survey of Callan consultants with extensive input from manager research, capital market research and defined contribution specialists. A detailed analysis of search activity is featured.

### STAR Report

Callan's Style, Trend, Analysis, and Research (STAR) Report, a verified view of net asset flows and asset gains, is a decision-making tool for investment managers. STAR's insights into investor trends and buying patterns help firms evaluate product positioning and marketing strategy. Using Callan's database expertise, STAR looks at product demand across 27 investment styles; over 2,400 institutional tax-exempt products and over 4,400 mutual fund products. To obtain the most meaningful information possible, we verify the data with investment managers and actively solicit missing information.

### Specialized Training

Callan's commitment to total customization extends to client education. Our consultants and specialists regularly visit our clients to provide on-site workshops and other forums tailored to the organization's specific needs.

## Upcoming Education Events

### “Callan College” for Investment Managers

*Fee-based event*

- September 2021, Chicago

### Callan Institute Member Events

*Included in Institute membership*

- **National Conference**  
**Salt Lake City, CA**  
July 19-21, 2021
- **Fall Conference**  
**Monterey, CA**  
September 12-14, 2021
- **Regional Workshops**  
November 2, 2021, Atlanta  
November 5, 2021, San Francisco

### Market Intelligence

*Subscription service*

- **2Q 2021 Webinar/Report**  
July 16, 2021
- **3Q 2021 Webinar/Report**  
October 15, 2021

### STAR

*Subscription service*

- **Mid-year 2021 Webinar/Report**  
September 2021

### Webinars

- **The Fed's Not Concerned About Inflation. Should You Be?**  
May 25, 2021
- **Diverse and Emerging Managers**  
June 11, 2021



To learn more about Callan educational offerings, please contact **Barb Gerraty** at 415-274-3093 or [gerraty@callan.com](mailto:gerraty@callan.com). Also, visit our website [callan.com](http://callan.com).