



Fixed Income Sales Managers' Roundtable

Recap:

Featuring 25 attendees from 20 middle market and regional securities firms, the BDA's Roundtable for Fixed Income Sales Managers was held in Memphis on January 22. Discussion leaders included heads of fixed income sales at Piper Jaffray, Wells Fargo Securities and FirstSouthwest, among others.

The event featured discussions on the following topics, as well as a presentation from Gregg Bienstock, CEO & Co-Founder, Lumesis Inc. and Ron Valinoti, President, Triangle Park and Board Manager, Municipal Bond Information Services (MBIS) on MBIS's market data, reporting services, and comparable securities service.

The Roundtable concluded with a cocktail reception and private dinner in downtown Memphis.

Roundtable Topics Included:

- Sales outlook for 2015
- Compensation trends for sales teams
- Motivating and recruiting sales teams
- Impact of increasing regulation
- Account management and distribution
- Trading / inventory management and the impact on sales
- Strategy / analytics teams and the impact on sales
- Training and continuing education
- Structural forces changing in the fixed income industry

This Roundtable is part of a series of BDA events specifically tailored to the unique interests of middle-market and regional fixed income dealers. For more information on BDA events, our advocacy agenda or how you can become more directly

involved, please contact Mike Nicholas at mnicholas@bdamerica.org.

We hope this information is helpful. Feel free to reach out to the BDA with any questions or comments.

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