Meet and learn from senior executives at Edwards Jones, a $4 billion private company, to understand how they strategically source business services. Jim Weddle, Managing Partner of Edward Jones and Keynote Speaker, will discuss his philosophy and share the firm's story of strategically sourcing real estate services* for their 11,500 offices to a domestic provider. The keynote will be followed by Edward Jones executives responsible for sourcing decisions, along with Edward Jones’ key service providers.

**Place:** Washington University Knight Center  
One Brookings Drive  
St. Louis, MO 63130-4899

**Agenda**

3:30 Arrival and pre-event networking  
4:00 Welcome: Richard G. Etzkorn, Executive Managing Director, Cassidy Turley  
4:05 Keynote Speaker: James Weddle, Managing Partner, Edward Jones

Jim Weddle is Managing Partner of Edward Jones, a financial services firm serving nearly 7 million individual investors in the United States and Canada. Today with more than 11,500 branch offices, Edward Jones is one of the largest U.S. financial services firms. During Mr. Weddle’s tenure, Edward Jones has grown from 9,000 to more than 12,000 Financial Advisors without merger or acquisition.

Mr. Weddle has led the firm to many recognized achievements and accolades including the following:

- #1 in J.D. Power’s client full-service investor satisfaction 4 of the last 5 years
- 8 top 10 ranking in Fortune’s “100 Best Companies to Work For,” including consecutive #2 rankings in 2009 and 2010

As a Financial Advisor, Mr. Weddle opened the Firm’s 200th branch in 1978. After serving clients in Connersville, IN, Mr. Weddle was named a Principal in the Firm in 1984 and was invited to St. Louis where he was given several responsibilities. Mr. Weddle has been a member of the Edward Jones Management Committee since 1987 and assumed responsibility for managing all of the Firm's branch offices in late 1997. Mr. Weddle has spent his entire career at Edward Jones; and he became the Firm’s fifth Managing Partner in 2006.

4:25 - Sourcing Relationships at Edward Jones

**Steve Ford – General Partner, Strategic Sourcing, Edward Jones**

Steve began his Edward Jones career in 2003 as the director of Vendor Management. In 2004, he became senior director of IS Cost Management, responsible for the Asset Management, Logistics & Warehousing and Vendor Management areas. In 2006, Ford helped create the Program Management office and took responsibility for IS Communication. In 2003, Ford was named a limited partner, and in 2007 he became a principal. In 2008, Ford transitioned from Information Systems to Finance, where he assisted in the development of a firm wide sourcing organization. In 2010 he added Facilities and Administrative Services to his responsibilities. Prior to Edward Jones, Ford held a variety of industrial technology-related positions, including manager of jet engine purchasing for American Airlines and cost analyst for Rockwell International’s Space Shuttle project.
Patrick Culleton – Principal, IS Infrastructure
Patrick joined Edward Jones in 1991 as an intern. In 1994 he was hired as an associate serving as a programmer/analyst responsible for the development and support of the firm’s payroll system. Culleton was named team leader in 2001 and department leader in 2004. He led the development and support of such systems as JonesLink, Portfolio, AccountLink and Request/Respond. In 2009, he became a director in the Enterprise Content Services areas with responsibility for the systems that support JonesLink content, Imaging and the Online File Cabinet, and application database design. He was named a principal with the firm in 2011 and today is responsible for several Information Systems infrastructure areas.

5:00 IAOP Announcements
5:05 Networking Reception (includes food and beverages)
6:30 Conclusion of the Meeting

Registration Required To Obtain A Parking Permit:
- Registration is open to IAOP Members & Non-members at no-charge. Click here to register (select “register for next meeting” bar)

Who Will Attend: Attendees at this event will be IAOP member and non-member professionals interested in how strategic sourcing evaluation and optimization can positively impact a firm’s competencies.

- CEOs, CMOs, COOs, CIOs and CAOs of organizations involved in Strategic Sourcing and Real Estate Outsourcing and IT Outsourcing
- VPs, directors and managers of Strategic Sourcing procurement and delivery
- Outsourcing service provider delivery executives, directors and managers serving the Real Estate Industry

About the IAOP Midwest Chapter: We are a chapter of International Association of Outsourcing Professionals. The chapter leaders are Richard G. Etzkorn, Executive Managing Director at Cassidy Turley, Matt Shocklee, CEO of Global Sourcing Optimization Services, Dr. Mary Lacity, Curators’ Professor of Information Systems at the University Missouri-St. Louis, Christopher Chung, CEO of Missouri Partnership, and Shane Mayes, Founder/CEO of Onshore Outsourcing. The IAOP® is the global, standard-setting organization and advocate for the outsourcing profession with a global community of more than 110,000 members.

Sponsors of the Event: