We will learn from senior executives how Edwards Jones, a $4 billion private company, strategically sources 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 and their 11,500 offices to a domestic provider. The keynote will be followed by Edward Jones executives in charge of sourcing decisions, including information technology, along with Edward Jones’ key service providers.

**Place:** Washington University Knight Center
(in the Anheuser-Busch Dining Hall)
One Brookings Drive
St. Louis, MO 63130-4899

**Agenda**

3:30 Arrival and pre-event networking

4:00 Welcome: Ralph Quatrano, Dean of Engineering & Applied Science, Washington University
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”: Panel Discussion with Q&A session

**Panel Moderator** – Mary Lacity, Curators’ Professor, University of Missouri – St. Louis

**Panelist** – 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, which later became the sourcing office. Two years later, he added Facilities and Administrative Services to his list of responsibilities. Before joining 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.
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, CIOs, COOs and CAOs of organizations involved in Strategic Sourcing
- VPs, directors and managers of Strategic Sourcing procurement and delivery
- Outsourcing service provider delivery executives, directors and managers serving the Real Estate and IT Industries
- Affiliated Professionals from organizations such as CoreNet Global, CCIM, SIOR, SIM, etc.

About Real Estate Outsourcing Services: In an economic landscape that has experienced challenge upon challenge, corporate real estate outsourcing is expanding at an ever increasing rate. Increasingly businesses seek ways of focusing ever more intently on their core business. Corporate real estate outsourcing is becoming more prevalent in the market place today. While corporate real estate outsourcing is relatively new, it is being recognized as a key business process to outsource. Real Estate typically represents 4-6% of revenues. In increasingly competitive industries, it is crucial to reduce the bottom line in any avenue available. While human resources, IT, etc. have been widely accepted as BPO functions; executives are realizing the ability to achieve additional efficiencies through outsourcing corporate real estate.

Patrick Culleton – Principal, IS Infrastructure, Edward Jones

Patrick joined Edward Jones in 1991 as an intern. Three years later, he was hired as an associate and served as a programmer/analyst responsible for the development and support of the firm’s payroll system. Culleton was named a team leader in 2001 and a department leader in 2004. In that role, 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 overall 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.

Dave Mytyk – Business Unit President, CBIZ Network Solutions

David entered into a business relationship with Edward Jones in 1992 providing them with a variety of Network Communications solutions. In 1994, he played a key role in the effort to design, engineer and implement a custom client-server based architecture for more than 3,000 Edward Jones branch offices. As Edward Jones continued to grow, it became clear that they needed a new strategy for servicing the equipment at their increasing number of branch locations. In 1998, David created a comprehensive service solution for Edward Jones that included installation, maintenance, and project deployment services. Additionally, he has been instrumental in implementing Move-Add-Change, Canadian, Campus, Project Management, Software Development, and Provisioning services.

Rich Etzkorn – Executive Managing Director, Principal, Cassidy Turley

Rich is responsible for the overall operations of Cassidy Turley Retail Services, which is a premier provider of outsourced corporate real estate services to retail corporations. In his current capacity, Rich oversees account teams comprised of more than 250 associates that manage more than 27,000 locations for Cassidy Turley clients in the United States and across the globe. Prior to this role, Rich was the Account Executive for Edward Jones Investments, helping to grow and manage the 11,600 brand portfolio. He also oversaw Edward Jones’ global branch office expansion program into the United Kingdom and Canada. Rich joined Cassidy Turley in 1986 as a Property Manager, became a Principal of the firm in 1990, and in 1992 joined Cassidy Turley’s Board of Directors.
About Information Technology Outsourcing Services: As the most mature outsourcing market for services, global Information Technology Outsourcing (ITO) revenues will probably exceed $US 290 billion in 2013 and will continue to grow 5% to 6% percent annually. The maturity in ITO means that many companies are in their third or fourth generation of ITO sourcing relationships. Beyond cost savings, companies are increasingly leveraging ITO providers for agility and innovation.

Sponsors of the Event