ADVANCE YOUR PROFESSIONAL KNOWLEDGE AT MER ‘15!

MER ‘15 features:

27 SESSIONS – operational, technical, & legal issues

11 SESSION THEMES – from “getting started” to “cutting-edge”

53 SPEAKERS – all renowned experts

PREMIER EXHIBITORS – providing solutions to your organizations’ issues

PIONEERING CASE STUDIES – insightful ideas & solutions

PRECONFERENCE TUTORIALS – in depth & interactive

NOW IS THE TIME TO REGISTER FOR MER ‘15

Every year, for the past 10 years, over 98% of the MER’s attendees have said they would recommend the MER conference.
CLEARLY THE BEST
Cohasset Associates, Inc. is proud to present the 23rd National Conference on Managing Electronic Records – MER ’15. MER is the longest running professional conference of its kind.

MER’s consistently high quality has made it the trusted source for RIM professionals seeking to expand their knowledge about electronic records management and information governance.

ADDRESSING THE ISSUES AND CHALLENGES
The MER is the only national conference addressing the issues and challenges of managing electronic records from three perspectives: LEGAL, TECHNICAL, AND OPERATIONAL.

PROFESSIONAL ADVANCEMENT
FOCUSED – The MER focuses exclusively on the management of electronic information and records (structured and unstructured), from its creation to its ultimate disposition.

CUTTING-EDGE CONTENT – Each MER ’15 speaker is committed to delivering both timely, accurate information – as well as an abundance of practical ideas.

INCISIVE CASE STUDIES – At the MER, you learn from real-world case studies – from those responsible for leading the implementations and integrations.

OUTSTANDING QUALITY – For the last 10 years, over 98% of MER attendees have said they would recommend the MER!

PREMIER EXHIBITORS
In private 1:1 meetings with the MER’s outstanding exhibitors, learn how their capabilities can address your needs.

GREAT NETWORKING
The MER is a unique opportunity to interact with peer professionals, leading authorities, and solution providers.

FELLOW REGISTRANTS – Breaks, meals, receptions

SPEAKERS – Throughout the conference

EXHIBITORS – 1:1 meetings

THE MER EXPERIENCE STARTS HERE
The annual MER conference is the “keystone” of the MER experience. Now, the MER experience continues throughout the year. All of the MER conference sessions are available via streaming video to every MER registrant – anyone, anywhere, anytime through RIM on Demand.

Special bonus for MER ’15 registrants! Your conference registration fee includes free access (in your office and/or home) for 1 year to every MER ’15 conference session – via RIM on Demand.
Choose one of the four limited-enrollment tutorials that provide in depth focus on important ERM issues.

T1. Understanding SharePoint as Microsoft Pushes to the Cloud
Mike Alsup – Gimmal
Susan Cisco – Gimmal
Karen Strong – Gimmal
Brad Teed – Gimmal
For most organizations using SharePoint, challenges remain regarding complex content and records management issues – particularly pushing SharePoint to the cloud. This tutorial will address recent Microsoft announcements and developments including cloud infrastructure, hybrid deployments, unified communications, social, and mobile. It also will discuss the gaps that need to be filled to achieve comprehensive information governance. MORE ▷

T2. Advance your Organization…Transition to Information Governance from Records and Information Management
Karen S. Knight – Cohasset Associates
Kenneth J. Withers, Esq. – Sedona Conference
Carol Stainbrook – Cohasset Associates
Is your organization ready for a re-alignment of its information-related practices, requirements, challenges and opportunities? If so, then it's time to make the move from Records and Information Management (RIM) to Information Governance (IG). This tutorial will address the typical challenges. It also will detail how to lead the charge for interdisciplinary collaboration and alignment. MORE ▷

T3. Creating an Information Governance (IG) Program Roadmap
Mark Diamond – Contoural
Greg Forest – Contoural
Many organizations are looking to upgrade their paper-centric records management program with an Information Governance program – to better manage their electronic information by including records compliance, eDiscovery, privacy and productivity. This “how-to-do” workshop will detail the essential components of a successful IG program – complete with a project plan, appropriate milestones, and metrics to measure success. MORE ▷

T4. How to Use Content Analytics to Improve Information Management
Jesse Wilkins, CRM – AIIM International
Analytical and semantic technologies now allow us to turn information chaos into information opportunities. This workshop’s goal is: providing practical, action-oriented strategies and techniques – to leverage content analytics in support of specific business objectives and information management requirements. You will learn about new content analytics tools to improve information management practices throughout the information lifecycle. MORE ▷

5:00 PM - 6:30 PM
Cohasset Associates Welcome Reception at the Westin Hotel

MER ‘15 SPEAKERS – ALL RENOWNED EXPERTS
MIKE ALSUP | JASON BARON | BARCLAY BLAIR | BENNETT BORDEN | ELLY BRACAMONTES | JULIA BRICKELL
JOSEPH BURTON | SUSAN CISCO | JULIE COLGAN | JIM COULSON | JAMES DALEY
MARK DIAMOND | JAY EDELSON | KAREN EHRLICH | RONKÉ EKWENSI | LAURIE FISCHER | GREG FOREST
HON. JAMES FRANCIS IV | HON. RONALD HEDGES | HON. JAMES HOLDERMAN | JOHN ISAZA
RANDOLPH A. KAHN | KAREN KNIGHT | JEANENNE LAMARSH | JOHNNY LEE | KON LEONG
JEREMY LEWIS | STEPHEN LUDLOW | LAURA MCKENZIE | BRUCE MILLER | SYLVAN MORLEY
JONATHAN REDGRAVE | TOM REDING | AL SAIKALI | MIKE SALVAREZZA | DEVIN SCHINDELE
JEFFREY SHARER | BILL SHUTE | DREW SORRELL | CAROL STAINBROOK | STEVE STEIN | CHERYL STROM
KAREN STRONG | BRAD TEED | SUE TROMBLEY | BRIAN TUERMMLER | JAMES WATSON | KURT WILHELM
JESSE WILKINS | ROBERT WILLIAMS | KENNETH WITHERS | DAVID YERICH
MONDAY, MAY 18, 2015

8:30 AM - 9:00 AM
Conference Opening

9:00 AM - 10:00 AM
1. OPENING KEYNOTE – Part 1: To Infinity and Beyond: Preparing for the Challenges of a Global ERM Future
Keynote Presentation: James Daley, Esq. and Hon. James C. Francis IV
Commentator: Mark Diamond
Moderator: Kenneth J. Withers, Esq.

New data types and sources proliferate daily. IT rolls out mobile devices, applications, and storage. Europe and China impose new RIM regulations. Employees wear data-collecting watches. Marketing collects “big data.” And now U.S. law enforcement has issued a subpoena in New York for your customer data Dublin. A well-known Federal judge, an attorney specializing in global RIM, and an attorney active in international standards-setting ask, “are you prepared for the challenges of an ever-expanding RIM universe?”
MORE ▶

10:00 AM - 10:30 AM
Refreshment Break

10:30 AM - 11:30 AM
2. OPENING KEYNOTE – Part 2: Making the Moonshot: Launching Your Information Governance Program
Keynote Presentation: Mark Diamond
Commentators: James Daley, Esq., Hon. James C. Francis IV
Moderator: Kenneth J. Withers, Esq.

In Session 1, the expert panelists sketched out the almost impossible demands that are likely to be placed on electronic records management in the 21st century. And it sounds like sending someone to the moon. But an effective Information Governance program will combine planning, skills, technology and attitude – the “right stuff” – to make this moonshot possible.
MORE ▶

11:30 AM - 12:00 PM
Refreshment Break

12:00 PM - 1:00 PM
3. Performance Prerequisites for 2020 eERM
Presenter: Jim Coulson – CCIM Consulting

Many macro factors are signaling that we are at a tipping point for eRIM to really come together. As the digital age matures, Legal, IT, and Records Managers are increasingly becoming more comfortable with how their roles and responsibilities have evolved – so their organizations can now achieve successful IG. Now the real work begins – implementation.
MORE ▶

1:00 PM - 2:30 PM
Seated Luncheon

2:30 PM - 3:30 PM (Choose #4, 5 or 6)
4. Turning the RIM Tide – How to Channel the Data Tsunami into A “Data Lake”
Kon Leong – ZL Technologies

Multiple copies of unstructured data live everywhere, making it very difficult to control or use the data. This session examines a new approach – where useful data is pooled into a common “data lake” to satisfy records, e-discovery, compliance and business analytics requirements, simultaneously. In this session, learn the key role records managers have in this convergence.
MORE ▶

5. CASE STUDY: Electronic Discovery & Information Governance – Flip Sides of the Same Coin
Johnny Lee – Grant Thornton LLP

This session’s will guide information governance professionals on: a) identifying major areas of legal and regulatory risk; b) understanding how data is identified, collected, and used during litigation, investigations, and regulatory inquiries; c) contributing to risk management discussions about managing data more effectively and defensibly; and articulating ways to improve data governance by leveraging existing organizational efforts.
MORE ▶

6. Information Risk Assessment: Seeing the Future and Guiding Yours
Jonathan Redgrave, Esq. – Redgrave, LLP
Mike Salvarezza – Independent Consultant

This session will examine the trends and expected developments affecting the creation, transmission and lifecycle management of records and information in the next five years. It then, will provide concrete ideas and suggestions to help RIM professionals implement new Records and Information Management programs, policies, and practices to meet the challenges of today and tomorrow.
MORE ▶

3:30 PM - 4:00 PM
Refreshment Break

4:00 PM - 5:00 PM (Choose #7, 8 or 9)
7. CASE STUDY: Advance your Organization...Transition to Information Governance from Records and Information Management
Karen Knight – Cohasset Associates

It’s time to move from Records and Information Management (RIM) to Information Governance (IG). Learn how to build a case for information governance – from someone who’s repeatedly “been there, done that”. Special focus will be given to overcoming the most prevalent obstacles and how YOU can “make the case” and “lead the charge”.
MORE ▶

TUESDAY, MAY 19, 2015

7:30 AM - 8:30 AM
Continental Breakfast

8:30 AM - 9:30 AM (Choose #10, 11 or 12)
10. The Internet of Things: The Issues RIM Professionals Need to Address Now to Be Ready for “Tomorrow”
Karen Ehrlich – Prudential
Carol Stainbrook – Cohasset Associates

By 2020, the Internet of Things will have 26 billion devices generating data to support a plethora of new business and government services – data which organizations will store, analyze, and leverage. To benefit from this once-in-a-lifetime opportunity, this insightful, cutting-edge session addresses five critically important topics on which the RIM professional must focus.
MORE ▶

8. Expanding Your Skill Set: How to Apply the “Right” Search Methods to Your Big Data Problems
Julia L. Brickell, Esq. – H5

A variety of information retrieval tools and techniques can be used to locate needed content that is buried somewhere in the corporate “big data” pile. Records management and information governance team members will benefit from increased familiarity with the availability, opportunities, strengths, and weaknesses of different approaches that can be used to search for information.
MORE ▶

Kenneth Withers, Esq. – The Sedona Conference®

2014 saw significant sanctions for records management failures, but also the emergence of “proportionality” and “reasonable efforts” as primary considerations for courts, expressed in proposed amendments to the federal discovery rules and decisions that anticipate those new rules. This fast-paced session – a MER tradition – will highlight the new rules and key court cases of the past year, providing the information and insights both lawyers and records managers seek, in a way that everyone can understand.
MORE ▶

5:00 PM - 6:30 PM
Networking Reception at the Westin
12. Data Integration – Defensibly Reducing Your Data During Mergers, Acquisitions, and Divestitures
Ronke Ekwenzi – Duff & Phelps LLC
Mergers, acquisitions and divestitures create an opportunity to defensibly dispose of information while simultaneously reducing costs and risk. This session will emphasize best practice methodologies and tools to enable an organization to defensibly dispose of data during a merger, acquisition or divestiture while managing the cost/risk equation. MORE ▶

9:30 AM - 10:00 AM
Refreshment Break

10:00 AM - 11:00 AM (Choose #13, 14 or 15)

13. CASE STUDY: E-mail Management: Same Problem, Different Solutions
Laurie Fischer – Huron Consulting Group
Laura McKenzie – 3M
Devin Schindele – Devon Energy Corporation
Cheryl Strom – McDonald’s Corporation
E-mail has revolutionized business communication, becoming a critical tool that supports an organization’s business transactions and internal operations. However, managing email in a manner that meets an organization’s information governance goals and objectives continues to be elusive. This session will present how three large organizations have addressed the legal, technical and change management challenges within their organizations to help attain risk mitigation, cost containment, and end-user compliance. MORE ▶

14. Content in Context – A New Way to Make EDRM Successful
Stephen Ludlow – Open Text
Managing and cleaning up information by its source is a “yesterday” approach that has resulted in an uncomfortably high percentage of EDRM implementations failing. You will learn how this major EDRM problem is solved – with a new content-in-context “process” dimension that meets “tomorrow’s” needs by replacing disjointed paper and paper-based methods with efficient, connected processes. MORE ▶

4:00 PM - 5:00 PM (Choose #15, 16 or 17)

15. A Proactive Approach to Avoiding Problematic Issues in Information Management Contracts
Joseph Burton, Esq. – Duane Morris LLP
Organizations are increasingly moving electronically stored information to 3rd party vendors, such as “cloud” providers – without insuring the confidentiality, integrity, and availability of the information. This session will a) identify the critical risks inherent in every form of outsourced records management and b) suggest contract-based solutions for maximizing your ability to eliminate or manage these risks. MORE ▶

11:00 AM - 11:30 AM
Refreshment Break

11:30 AM - 12:30 PM (Choose #16, 17 or 18)

16. Managing Change to Achieve Results – A Journey of Discovery for e-Records and Information Governance Programs*
Rick Rothenmel – L&March Global
Karen Strong – Gimmal
Change is not a single event! Change is a transitional process organizations go through to move from their current state to a desired future state. This session is a “journey of discovery” through a proven process of defining the change, identifying its impact, understanding resistance, and developing a compelling vision for the changes that will occur. MORE ▶

*Optional Lunch-and-Learn in Millenium Park Ballroom on 3rd floor, immediately following.

17. CASE STUDY: Classification: Parsing the Platypus
Brian Tuemmler – Nuix
A critical aspect of being able to manage electronic records is to be able take massive amounts of unstructured content and separate items to buckets for action. Using real company examples, this presentation will look at tools, tips and techniques for metadata classification, subject based analytics, predictive coding, near duplicate analysis, and topic modeling. MORE ▶

12:00 PM - 1:00 PM (Choose #18, 19 or 20)

18. Defensible Disposition Strategies for Disposing of Structured Data – E-Trash
John Isaza, Esq. – Rimon, PC
Tom Reding – Information Governance Solutions
Disposition of structured data requires sound Information Governance for systems such as SAP, Oracle or even decommissioned systems (aka legacy systems). Yet it receives little attention. This session will present a) real-world examples of how inadvertent results in significant IG risks and problems; and b) illustrations of a “best practices model” to reduce risks and problems. MORE ▶

12:30 PM - 2:00 PM
Seated Luncheon

2:00 PM - 3:00 PM (Choose #19, 20 or 21)

19. The Real Deal: Continuing the Conversation Inside an Information Governance Council Meeting – from Five Perspectives: RIM, Legal, IT, Privacy, and Business
Elly Bracamontes – NACCO Materials Handling Group
Karen Knight – Cohasset Associates
Jeremy Lewis – Federal Reserve Bank of Chicago
Sibito Morley – DaVita
Sue Trombley – Iron Mountain Consulting
Kurt Wilhelm – NBC Universal
Curious about what happens during an Information Governance (IG) Council meeting? This mock meeting is a continuation of the conversation begun at MER in 2014 and will give you an insider’s view as representatives navigate the pressing issue of big data, and how it effects them. Hear each point of view and watch the negotiation process as they build a strategy for managing content not just as a liability but also as an asset. MORE ▶

20. Which SharePoint “Record Keeping Add-in” Is Right for Your Organization: Comparative Analysis of Four Options
Bruce Miller – RIMtech
There are no less than four commercial add-in products for Microsoft SharePoint that augment the platform’s native recordkeeping capabilities. All deliver similar recordkeeping capabilities, but they are quite different technically and functionally. Which one is the best fit for your particular project? Learn the crucial underlying differences between the products, so you can apply the appropriate solution to your particular recordkeeping requirements. MORE ▶

Jason Baron, Esq. – Drinker, Biddle, and Reath
Julie Colgan – Nuix
Jeffrey Shaver, Esq. – Akerman LLC
Steve Stein – KPMG
David Yerich – United Health Group
This session explores the rise of predictive analytics in information governance and practical applications for such technologies. Specifically, it will address the dangers of data hoarding and how technologies, such as predictive coding, can enable organizations simultaneously to meet legal and regulatory obligations… while cost-effectively and defensibly dispose of digital ROT with significant, quantifiable ROI. MORE ▶

3:00 PM - 4:00 PM
Seated Luncheon

MER’15 CONFERENCE PROGRAM
22. CASE STUDY: Building the Business Case for an Overall RIM Program: Techniques to Leverage for a Compelling Justification
This session will provide specific examples of how organizations have created business cases for their records and information management programs. A number industry metrics will be provided that attendees can use in their own justifications. The session also will show how to forecast and model benefits associated with productivity gains, reduced storage costs, and ESI collection expense. MORE ►

23. Voice Data: Everyone Has It, but Few Have a Management Solution So It Can Be Used Effectively Over Time
Sibito Morley – DaVita
Most organizations have voice data recording solutions in place to meet their retention requirements. Few, however, mine their voice interactions. This presentation addresses how, through improved life-cycle management of their audio customer interactions, organizations can increase sales effectiveness, reduce operating costs, and simplify compliance – by just changing the way they manage and govern their voice data. MORE ►

24. An Up-to-Date Answer to a Long-Standing Question: Can Paper Records That Have Been Imaged Then Be Destroyed?
Ron Hedges – Ronald J. Hedges, LLC
Robert Williams – Cohasset Associates
Can paper records, which have been imaged, be destroyed? For virtually all imaged paper records, there is no reason to retain the original "paper" for any length of time. Further, imaged records should be as admissible in a legal proceeding even though they are copies of destroyed paper records. Experts will detail why and how. MORE ►

5:00 PM - 6:30 PM
Cohasset Associates Networking Reception at the Chicago Yacht Club

“Great sessions, current issues, good informative meetings with vendors by appointment. Well done.”

THE WESTIN MICHIGAN AVENUE
The Westin Hotel in Downtown Chicago, on the “Magnificent Mile” is the official MER Conference hotel.

909 North Michigan Avenue
Chicago, Illinois 60611
312.943.7200

Reservation deadline to receive the conference rate of $266/night is April 12, 2015 at 5:00 p.m. Central Time.

www.merconference.com/the-mer-conference-hotel-and-venue/
THE ONLY CONFERENCE WHERE YOU CAN MEET ALL THE KEY EXHIBITORS!
<table>
<thead>
<tr>
<th>MER Session Number</th>
<th>Best Practices in E-records Management</th>
<th>Case Study</th>
<th>Conceptual/Informational Governance</th>
<th>Destroying Dead Data</th>
<th>Email</th>
<th>Getting Started in E-records Management</th>
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**REGISTRATION**  Advance registration is required.

- MER Conference – May 18-20 $1,795
- Pre-Conference Tutorials – May 17 $695

Circle One

- T1: Understanding SharePoint as Microsoft Pushes to the Cloud
- T2: Advance your Organization…Transition to Information Governance from Records and Information Management
- T3: Creating an Information Governance (IG) Program Roadmap
- T4: How to Use Content Analytics to Improve Information Management

**PAYMENT**

- ☐ Check enclosed
- ☐ Please invoice the above address

- ☐ VISA
- ☐ MasterCard
- ☐ AMEX

<table>
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<th>Exp. Date</th>
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Signature

*Please note:* Your mailing contact information will be provided to the MER conference exhibitors prior to your arrival unless you indicate otherwise. ☐ Do not contact.

**CONFERENCE SCHEDULE**

The 22nd Annual National Conference on Managing Electronic Records will be held May 18 - 20, 2015, in Chicago, Illinois at the Westin Michigan Avenue Hotel – downtown on the “Magnificent Mile.”

The conference begins at 8:30 am on Monday and adjourns at 12:30 pm on Wednesday. Please check in 30 minutes before the conference begins.

**PRE-CONFERENCE SCHEDULE**

The Pre-Conference Tutorials will be held May 17, 2015, at the Westin Hotel. Choose one of four sessions, all starting at 10 am. Lunch and refreshments are provided.

**REGISTRATION FEE**

The full registration fee is payable in advance by check, purchase order, or credit card: VISA, MasterCard, or American Express. Checks should be made payable to Cohasset Associates, Inc., Federal ID No. 36-2716388. See website for MER cancellation policy.

**INVOICING**

Cohasset Associates will invoice registrants if requested. Invoiced registrants will be billed a $50 service charge. POs must include this charge.