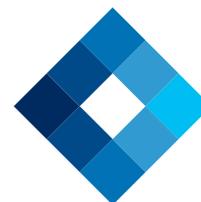


BUILD YOUR COMMUNITY



42ND ANNUAL MARKETING &
SALES CONFERENCE
APRIL 28-30, 2019
ARIZONA BILTMORE, PHOENIX, AZ



AIMSE

PROGRAM

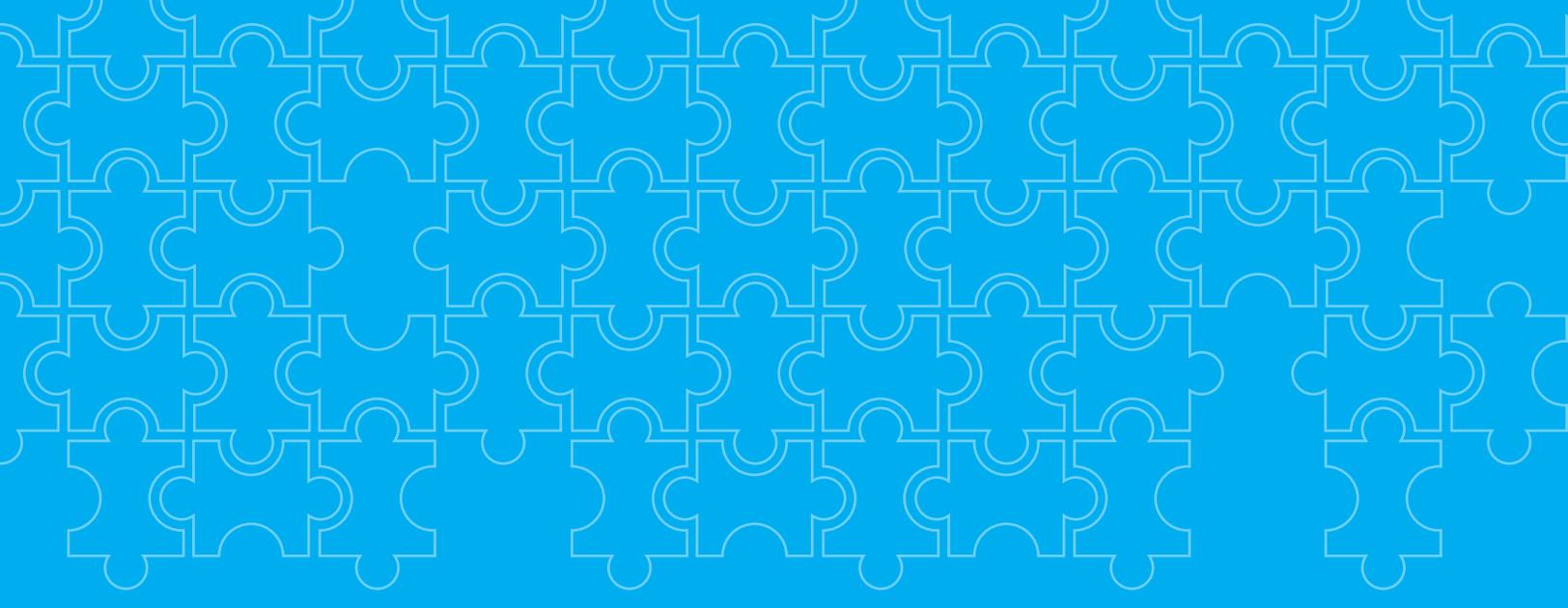
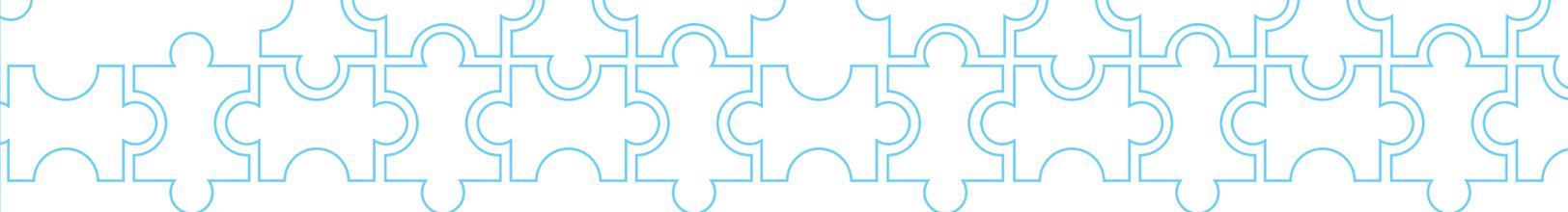


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DEAR AIMSE MEMBERS:

Thank you for being a part of the AIMSE 42nd Annual Marketing & Sales Conference.

We are honored to have created an educational, impactful, and memorable program. We truly appreciate your attendance and look forward to seeing everyone connect, learn, and have fun.

Our marketing and sales effectiveness is based on interpersonal relationships, story sharing and face-to-face interaction, which is at the heart of every community. We have discovered countless examples of AIMSE members meeting at this conference (in one case 18 years ago) and helping one another achieve greater success.

We have chosen this year's theme of **Build Your Community** to reflect the importance of these lasting relationships in our industry. Community is a core AIMSE value and we encourage you to engage with your fellow conference goers with the spirit of this shared value; introduce yourself and build your community.

The conference program contains an impressive set of leading asset allocators and a wide variety of investment consultants to participate in sessions dedicated to discussing important industry topics. Session panels are diversified across coverage channels, subject matter, and traditional and alternative asset classes.

A few highlights:

- Keynote speakers Ron Tite and Colette Carlson will inspire you to refocus, reimagine and reengage your work and life through storytelling and the power of human connection.
- General session topics covering consultant consolidation, OCIO future trends and wealth management convergence.
- Senior consultants from over a dozen firms, including the ever-popular consultant roundtable session.
- Panel discussion featuring recipients of CIO Magazine's NextGen and 40 Under Forty Awards in addition to several other plan sponsor panels with representatives from leading institutions.

- Institutional investors, representing large, medium, and smaller pension plans discuss the pursuit of very different strategies. These differentiated strategies are driven by their size, specific goals, and investment philosophies.
- Professional development presentations: Neen James, a terrific speaker, will help provide us with a sales effort tune up, and our own Michael Gillis is determined to help us "not throw away our shot!"

As always, we have partnered with industry leading sponsors and exhibitors who have developed robust and intelligent tools to help marketing and sales executives succeed. They would love to meet you and find out how they can help your firm succeed in this increasingly competitive marketplace. Please take some time to learn about their value add.

It wouldn't be an AIMSE conference if we didn't include fun events to help foster new relationships and strengthen existing ones. In addition to our traditional golf, tennis, and volleyball tournaments, we have created a few community building activities into the program which you will find throughout the conference. Please consider joining us at the end of the conference for a community service outing where we will go to The Society of St. Vincent de Paul to volunteer in their dining rooms and serve those in need.

We want to say thank you to this year's conference committee for their tireless efforts to deliver a program and speakers that will help you excel as a marketing and sales professional. If you are interested in getting more involved in future AIMSE events, please seek out someone from our planning committee or the AIMSE Board of Directors.

Again, thanks for your attendance and we look forward to seeing you at the conference!

Heather Beatty

First Eagle Investment Management
Conference Co-Chair

Tony Buscemi

Gallatin Capital
Conference Co-Chair



AIMSE/TOIGO SCHOLARSHIP

AIMSE is proud to partner with The Robert Toigo Foundation since 2017 to promote diversity in the asset management industry. AIMSE embraces Toigo's mission to foster the career advancement and increased leadership of underrepresented talent by creating mechanisms for greater inclusion from the classroom to the boardroom.

On behalf of the AIMSE membership, the Board of Directors established a scholarship program for participants of the Toigo Fellowship program. Currently, we have four AIMSE Toigo Fellow Scholarship Recipients:

Ashley Allen, 2017 Recipient

Columbia University Business School

Alex Robles, 2017 Recipient

The Wharton School

Karen Nyawera, 2018 Recipient

Harvard Business School

Brandon Yu, 2018 Recipient

Harvard Business School

The scholarships provides tuition assistance, paid directly to their respective elite graduate MBA business school. In addition to monetary support, the AIMSE Toigo scholarship recipients are provided full AIMSE memberships and are encouraged to engage in regional events and attend both the AIMSE Fall Conference and Annual Marketing & Sales Conference. Providing networking and career opportunities is paramount. If you would like to connect with the AIMSE Toigo Fellow Scholarship Recipients, please [contact the AIMSE office here](#) or call 703-234-4098.

AIMSE BOARD OF DIRECTORS 2018-2019

The AIMSE Board of Directors is comprised of members and acts in the best interests of the membership. All Board members are accessible to the AIMSE membership and feedback is welcomed.

2018-2019 OFFICERS

Christopher Paoella

President, AIMSE
Invesco

Michael R. Gillis

Vice President, AIMSE
TD Greystone Asset Management

Kurt P. Terrien

Treasurer, AIMSE
Clarkston Capital Partners

Carolyn Patton, CFA

President Emeritus, AIMSE

2018-2019 BOARD OF DIRECTORS

Alejandra Argüello, CFA, CAIA

Caspian Capital LP

Greg Bauer, CFA, CAIA

Parametric Portfolio Associates

Heather Beatty

First Eagle Investment Management

Tony Buscemi

Gallatin Capital

Gus Catsavis, CFA

Pinnacle Asset Management, L.P.

Ami Fox

Artisan Partners, Limited Partnership

Adam Gerentine

Trinity Street Asset Management

Tim Hill

Consilium Investment Management

Tasleem Jamal, CFA

Sprucegrove Investment Management Ltd.

Bart Marchant

GQG Partners

John Mirante, CFA, CPA

BMO Global Asset Management

Matt Pawlak

Dimensional Fund Advisors

Kerra Smith

Lawton Park Capital Management, LP

Mark A. Sullivan

Bridgeway Capital Management

Miriam Tai, CFA, CAIA

Franklin Templeton Investments

Derek Tubbs

CornerCap Investment Counsel

Kimberley Woolverton, CFA

Foyston, Gordon & Payne, Inc.

Keith Wosneski

Mackenzie Investments

AIMSE COMMITTEE CHAIRS 2018-2019

Annual Conference Committee

Heather Beatty, Co-Chair

First Eagle Investment Management

Tony Buscemi, Co-Chair

Gallatin Capital

Awards Committee

Chris Paoella, Chair

Invesco

Canadian Committee

Kimberley Woolverton, CFA, Chair

Foyston, Gordon & Payne

Communications Committee

Gus Catsavis, CFA, Chair

Pinnacle Asset Management, L.P.

Mark Sullivan, Co-Chair

Bridgeway Capital Management

Fall Conference Committee

Adam Gerentine, Co-Chair

Trinity Street Asset Management

Kerra Smith, Co-Chair

Lawton Park Capital Management, LP

Finance Committee

Kurt Terrien, Chair

Clarkston Capital Partners

Michael Gillis

TD Greystone Asset Management

Chris Paoella

Invesco

Carolyn Patton, CFA

AIMSE President Emeritus

Membership Committee

Derek Tubbs, Chair

CornerCap Investment Counsel

Nominating Committee

Carolyn Patton, CFA, Chair

AIMSE President Emeritus

Partner Relations Committee

Tim Hill, Chair

Consilium Investment Management

Greg Bauer, CFA, CAIA, Co-Chair

Parametric Portfolio Associates

Regional Events Committee

Miriam Tai, Chair

Franklin Templeton Investments

Greg Weissman, Advisor

Jennison Associates

Scholarship Committee

Carolyn Patton, CFA, Chair

AIMSE President Emeritus

Alejandra Argüello, CFA, CAIA

Caspian Capital LP

Heather Beatty

First Eagle Investment Management, LLC

Strategic Planning Committee

Michael Gillis, Chair

TD Greystone Asset Management

Chris Paoella

Invesco

Carolyn Patton, CFA

AIMSE President Emeritus

Kurt Terrien

Clarkston Capital Partners

REGIONAL EVENT CHAPTER CONTACTS

Atlanta

Greg Bauer

Parametric Portfolio Associates

Derek Tubbs

CornerCap Investment Counsel

Boston

Keith Wosneski

Mackenzie Investments

California

Marni Harp

Schroder Investment Management North America

Sean Mihal

Russell Investments

Chicago

John Mirante

BMO Global Asset Management

Sean Clark

Westwood Holdings Group, Inc.

Connecticut

Kerra Smith

Lawton Park Capital Management, LP

Denver

Lewis Del Ponte

Ranger Capital

Kristin Fenik

ArrowMark Partners

Mark Robertson

Proprietary Capital

Miami

Matt Crowe

GQG Partners

New York

Miriam Tai

Franklin Templeton Investments

Philadelphia

Ted Hart

Macquarie Investment Management

Phoenix

Mark Robertson

Proprietary Capital

Portland

Rodrigo Soto

Morgan Stanley Investment Management

Seattle

Rodrigo Soto

Morgan Stanley Investment Management

St. Louis

Gus Catsavis, CFA

Pinnacle Asset Management, L.P.

Texas

Matt Pawlak

Dimensional Fund Advisors

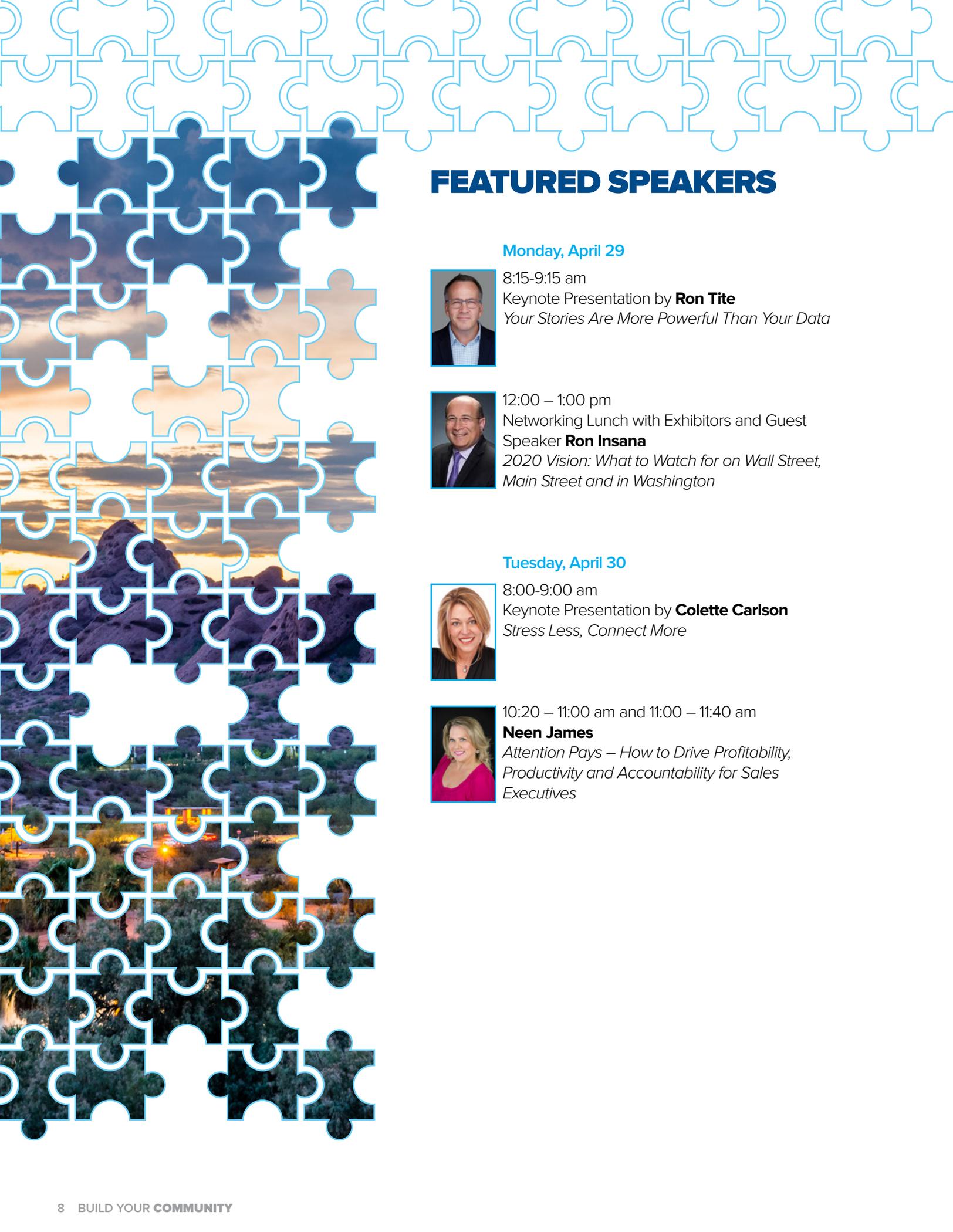
Mark Robertson

Proprietary Capital

Toronto & Montreal

Jay Wiltshire

TD Greystone Asset Management



FEATURED SPEAKERS

Monday, April 29



8:15-9:15 am

Keynote Presentation by **Ron Tite**

Your Stories Are More Powerful Than Your Data



12:00 – 1:00 pm

Networking Lunch with Exhibitors and Guest Speaker **Ron Insana**

2020 Vision: What to Watch for on Wall Street, Main Street and in Washington

Tuesday, April 30



8:00-9:00 am

Keynote Presentation by **Colette Carlson**

Stress Less, Connect More



10:20 – 11:00 am and 11:00 – 11:40 am

Neen James

Attention Pays – How to Drive Profitability, Productivity and Accountability for Sales Executives

SCHEDULE AT A GLANCE

SUNDAY, APRIL 28		
Aztec Room	7:00-8:00 am	Golf Tournament Registration & Breakfast
Arizona Biltmore Golf Club, Links Course	8:00 am-12:00 pm	Golf Tournament
Arizona Biltmore Golf Club	10:00-11:30 am	Golf Clinic
Aztec Room	12:00-1:30 pm	Luncheon for Golf Tournament and Clinic Participants
Grand Canyon Room	2:30-5:30 pm	AIMSE Boot Camp
Arizona Biltmore Ballroom Foyer	4:00-8:00 pm	Conference Registration
Aztec Room	6:00-6:30 pm	Newcomer & Mentor Reception
Grand Ballroom	6:30-9:30 pm	Welcome & Exhibitor Reception
MONDAY, APRIL 29		
Arizona Biltmore Ballroom Foyer	7:00 am- 3:30 pm	Conference Registration
Grand Ballroom	7:00-8:00 am	Breakfast with Exhibitors
Mesa/Flagstaff Room	8:00-8:15 am	AIMSE President's Welcome
Mesa/Flagstaff Room	8:15-9:15 am	Keynote Presentation by Ron Tite: Your Stories Are More Powerful Than Your Data
Mesa/Flagstaff Room	9:15-9:45 am	A Word From Our Partners
Mesa/Flagstaff Room	9:45-10:45 am	State of the State: Consultants, Consolidation and the Cycle
Grand Ballroom	10:45-11:00 am	Refreshment Break with Exhibitors
Track 1 - Casa Grande Room Track 2 - Sedona Room Track 3 - Grand Canyon Room	11:00-11:50 am	Concurrent Breakout Sessions Track 1: Traditional Investments Track 2: Alternatives Track 3: Professional Development
Grand Ballroom	12:00 -1:00 pm	Networking Lunch with Exhibitors and Guest Speaker Ron Insana 2020 Vision: What to Watch for on Wall Street, Main Street and in Washington
Mesa/Flagstaff Room	1:10-2:10 pm	Outsourced CIO, The Next Chapter
Grand Ballroom	2:10-2:40 pm	Refreshment Break with Exhibitors
Track 1 - Casa Grande Room Track 2 - Sedona Room Track 3 - Grand Canyon Room	2:45-3:45 pm	Concurrent Breakout Sessions Track 1: Traditional Investments Track 2: Alternatives Track 3: NextGen
Tennis - Tennis Courts Volleyball - Paradise Garden	4:30-6:45 pm	Optional Outdoor Activities - Tennis Tournament - Volleyball Tournament
Gold Room	7:30-8:00 pm	Cocktail Reception
Mesa/Flagstaff Room	8:00-11:00 pm	Dinner & AIMSE Lothrop Award Presentation

SCHEDULE AT A GLANCE

TUESDAY, APRIL 30		
Arizona Biltmore Ballroom Foyer	7:00 am – 1:00 pm	Conference Registration
Grand Ballroom	7:00-8:00 am	Breakfast with Exhibitors & AIMSE Annual Business Meeting
Mesa/Flagstaff Room	8:00-9:00 am	Keynote Presentation by Colette Carlson: Stress Less, Connect More
Mesa/Flagstaff Room	9:00-10:00 am	Institutional Investment Consultants and Wealth Management: The Path of Convergence
Grand Ballroom	10:00-10:20 am	Refreshment Break with Exhibitors
Session 1 - Casa Grande Room Session 2 - Grand Canyon Room Session 3 - Sedona Room	10:20-11:40 am	<p>Concurrent Breakout Sessions Meet the Allocators Parts I and II</p> <p>Please note each session is 40 minutes in length beginning at 10:20 am and repeating at 11:00 am. Attendees are encouraged to select one session per time period.</p> <p>Session 1: Moving Forward in Healthcare</p> <p>Session 2: Exploring the Impact of a Plan's Size and Investment Philosophy</p> <p>Session 3: Attention Pays – How to Drive Profitability, Productivity and Accountability for Sales Executives</p>
Mesa/Flagstaff Room	11:50 am -1:20 pm	Consultant Roundtables
Grand Ballroom	1:20-2:20 pm	Networking Lunch with Exhibitors
Transportation Departs from Main Lobby	3:00 – 7:00 pm	Post-Conference Volunteer Activity at The Society of St. Vincent de Paul



Callan LLC

Callan's Institutional Consulting Group (ICG) empowers investment management organizations with the research, education and analytical services necessary to succeed in an evolving and extremely competitive environment. Callan assists investment management organizations in three areas:

1. Market Trend Analysis
2. Portfolio Analytics
3. Institutional Investment Education

Callan

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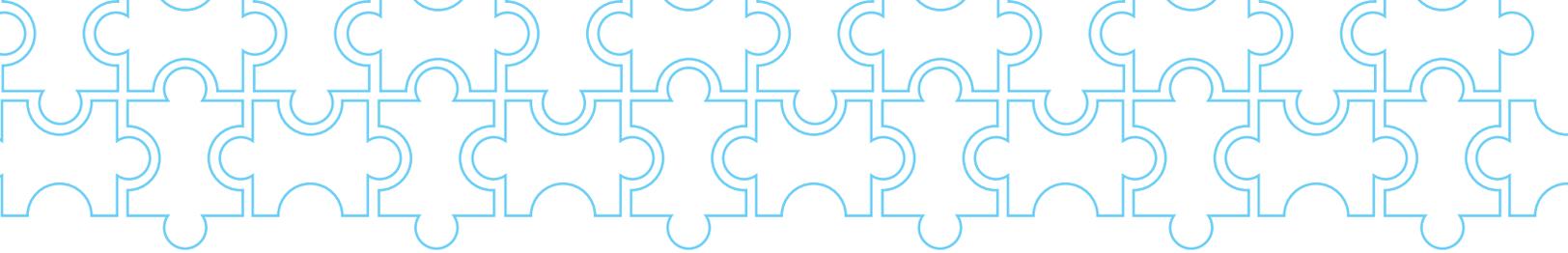
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EXTENDED SCHEDULE

SUNDAY, APRIL 28

7:00-8:00 am

Golf Tournament Registration & Breakfast

Aztec Room

8:00 am-12:00 pm

Golf Tournament

Arizona Biltmore Golf Club,
Links Course

10:00-11:30 am

Golf Clinic

Arizona Biltmore Golf Club

Golf is a proven business development skill. Are you new to the game or interested in an early season tune-up rather than playing the full tournament? We've organized the golf clinic just for you. The clinic includes use of rental golf clubs and offers 1.5 hours of personalized instruction from resort golf professionals on all the basics of the game (full swing, putting and chipping).

12:00-1:30 pm

Luncheon for Golf Tournament and Golf Clinic Participants

Aztec Room

2:30-5:30 pm

AIMSE Boot Camp

Grand Canyon Room

This pre-conference session is targeted toward those marketers new to the business as well as more experienced marketers looking to shift their sales performance into high gear. The goal of this session is to provide guidance on a "soup to nuts" approach to marketing success for both traditional and alternative products. The AIMSE Boot Camp is an opportunity to learn and ultimately succeed as this program was created by investment sales professionals for investment sales professionals. Topics will include:

- Understanding the Investor Sales Cycle
- Building a Team
- Engaging Investors
- Presentation Skills
- Building Relationships
- Due Diligence
- Marketing Resources
- Marketing Tips and Tricks

Moderators:

Michael Gillis

Vice President & Director, Institutional Relationships
TD Greystone Asset Management

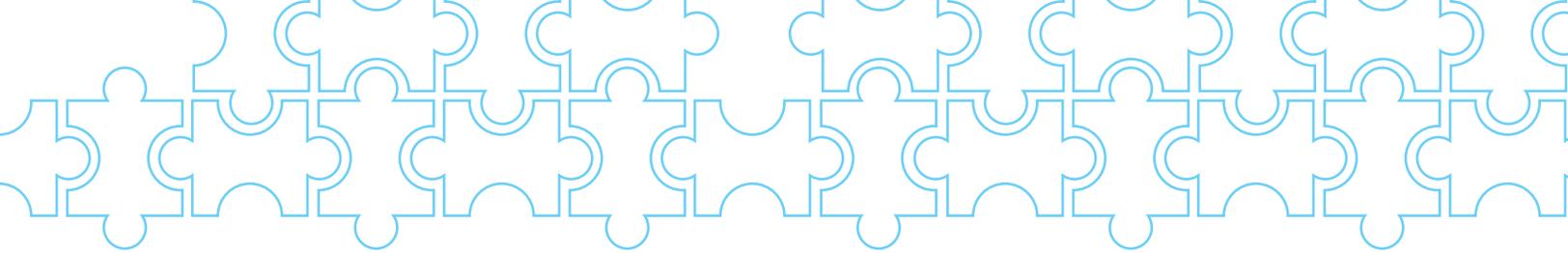
Chris Rae

Managing Director
Elevation Marketing Advisory

4:00-8:00 pm

Conference Registration

Arizona Biltmore
Ballroom Foyer



6:00-6:30 pm **Newcomer & Mentor Reception**

Aztec Room

6:30-9:30 pm **Welcome & Exhibitor Reception**

Grand Ballroom

MONDAY, APRIL 29

7:00 am-3:30 pm **Conference Registration**

Arizona Biltmore
Ballroom Foyer

7:00-8:00 am **Breakfast with Exhibitors**

Grand Ballroom

8:00-8:15 am **AIMSE President's Welcome**

Mesa/Flagstaff Room

8:15-9:15 am **Keynote Presentation by Ron Tite: Your Stories Are More Powerful Than Your Data**

Mesa/Flagstaff Room

Once upon a time, business was interesting. Then we discovered metrics and spreadsheets. Before you know it, the left brainers took over and we became a legion of data evangelists who let the numbers speak for themselves. There's only one problem. Numbers are boring as hell. Data can help you make important decisions but it should never speak for you. The stories of your customers, the stories of your brand's promise, the stories of your experiences, heck, even the stories of your stories are far more interesting than any graph or table. Ron's humorous and interesting session will help you and your team collect, curate, tell and share the stories you already have.

9:15-9:45 am **A Word From Our Partners**

Mesa/Flagstaff Room

9:45-10:45 am **State of the State: Consultants, Consolidation and the Cycle**

Mesa/Flagstaff Room

This session features leaders of top consulting firms in the U.S. Topics will range from how each firm views itself in the context of the marketplace to a discussion the future of offering high quality institutional investment consulting services and/or delegated services to plan sponsors. In the age of consolidation, what do the recent mergers mean for firms who are big getting bigger – can they differentiate their models from other mega firms? Conversely, what are the benefits and challenges of remaining a boutique investment consulting firm? Can both models survive?

Moderator:

Bonnie Stanfield, CFA

Director, Consultant Relations
Putnam Investments

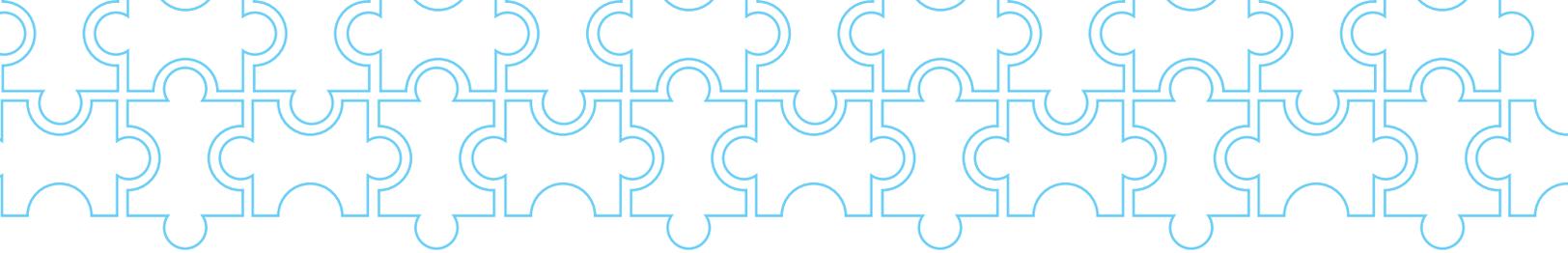
Speakers:

Janet Becker-Wold, CFA

Senior Vice President & Manager
Callan

Russell Ivinjack

Senior Partner
Aon



EXTENDED SCHEDULE (CONTINUED)

Rich Nuzum, CFA

President, Wealth
Mercer

George Tarlas, CFA

Senior Managing Director
Asset Consulting Group

10:45-11:00 am

Refreshment Break with Exhibitors

Grand Ballroom

11:00-11:50 am

Concurrent Breakout Sessions

Casa Grande Room

Track 1: Traditional Investments

Have We Seen This Movie Before? What Has Changed and What Have We Learned?

In 2008, we were deep in the throes of the global financial crisis. Since the equity markets bottomed, we experienced one of the longest market recoveries in US history. Lately, however, volatility has returned, interest rates are on the rise, and equity valuations are relatively high. Does this sound familiar or is it different this time? Come learn how our expert panelists are positioning their portfolios in this environment and where they are seeking to find pockets of opportunity.

Moderator:

Kurt Terrien

Managing Director, Institutional Sales
Clarkston Capital Partners

Speakers:

Erin Archer, CFA

Treasurer
DePaul University

Thomas Foster, CFA

Director, Pension & Trust Investments
Pinnacle West Capital Corporation

Anurag Pandit, CFA

Chief Investment Officer
ALSAC, St. Jude Children's Research Hospital

Ronald Thompson, CFA, CAIA

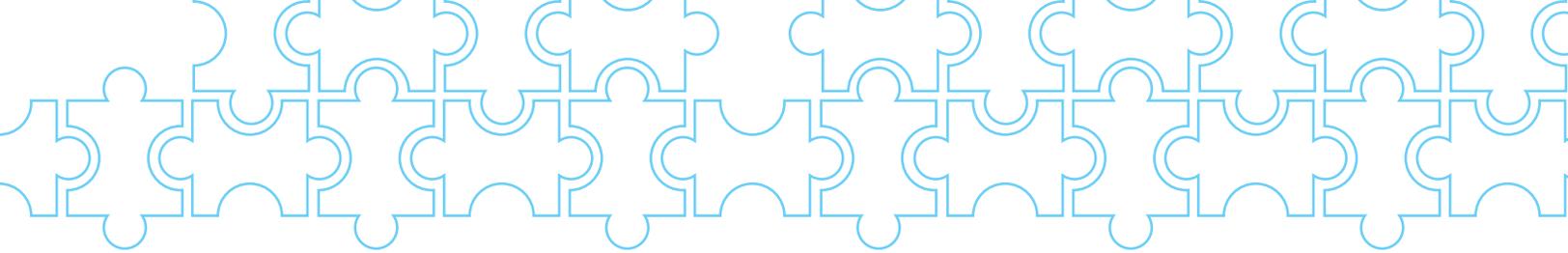
Vice President, Pension Investments & Chief Investment Officer
Alcoa Corporation

Sedona Room

Track 2: Alternatives

Alternative Investment Panel 20/20

For nearly a decade, equity valuations have thrived in a bull market. Allocations to alternative strategies have remained robust and stable despite questions as to whether alternatives remain in favor with investors. Investors continue to maintain a diverse portfolio of alternatives, with the current lion's share going to hedge funds, private equity and real estate. Recently allocations to real assets and uncorrelated or diversifying strategies are making headway. Is convergence occurring among managers in different corners of the alternatives industry? Will alternative managers be affected by the same disruption throughout the institutional investment industry? Will investors demand more standardization or more customization? Finally, who will emerge as the leader in terms of advice and guidance within the alternative investment landscape, what will that model look like? Join a panel of alternative investment allocators as they discuss their current observations, preferences, best practices, and outlook for the industry.



Moderator:

Harshal Shah, CFA

Senior Vice President
Callan

Speakers:

Kirill Buzinov

Associate, Absolute Return
Perella Weinberg Partners

Mark Cagwin, CFA, CPA

System Director, Treasury & Investments
SSM Health Care Corporation

Troy Searles, CFA

Co-Chief Investment Officer
Federated Management Services

Trevor Williams, CFA, CAIA

Managing Director, Portfolio Manager
Penn Mutual Asset Management

Grand Canyon Room

Track 3: Professional Development

I Am Not Throwing Away My Shot – Alexander Hamilton (the Musical)

We work so very hard to make it to the finals and we don't want to "throw away our shot" at winning the business. Not everything is in our control but for those things that are in our control, this master class is for you. Join this professional development community, and together we will explore the Art of Q&A – that once mastered – results in improved win rates. We will also take a master class look at the opening of your finalist presentation including: What brain science tells us is happening in the first 9 seconds, 90 seconds, and the first 9 minutes - and what we can do as a result.

Moderator:

Michael Gillis

Vice President & Director, Institutional Relationships
TD Greystone Asset Management

Speakers:

Tim McAvoy

Client & Consultant Relations
Coho Partners

Lori McEvoy

Managing Director, Global Head of Distribution
Jennison Associates

Matt Pawlak

Vice President
Dimensional Fund Advisors

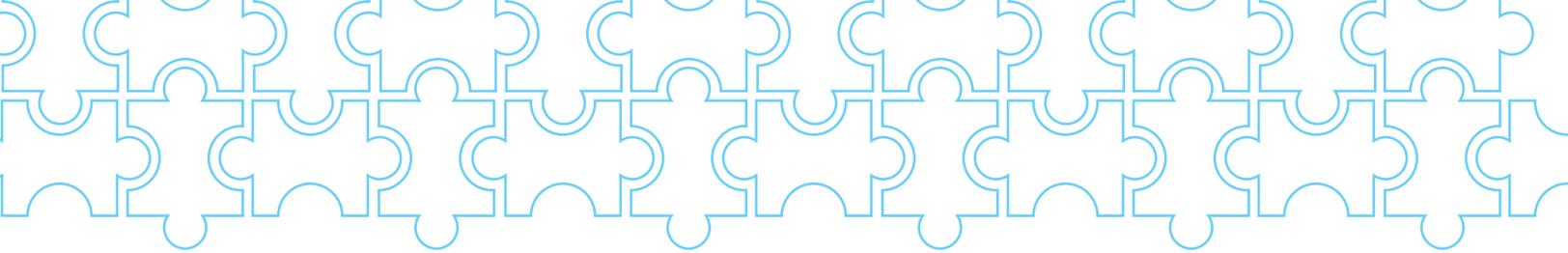
12:00-1:00 pm

Grand Ballroom

Networking Lunch with Exhibitors and Guest Speaker Ron Insana

2020 Vision: What to Watch for on Wall Street, Main Street and in Washington

There are no shortages of narratives coming out of the US economy, whether it be political or economics-based. From an investments perspective, Schroders' Senior Adviser and CNBC contributor Ron Insana will provide insight on where he sees pillars of strength, signs of economic weakness, and specific external risks that could disrupt what continues to be one of the few shining bright spots in today's global economic story.



EXTENDED SCHEDULE (CONTINUED)

1:10-2:10 pm

Mesa/Flagstaff Room

Outsourced CIO, The Next Chapter

The OCIO channel is the fastest growing segment of the institutional marketplace. Our panel will discuss the expected long-term ramifications and how asset managers can maximize the OCIO growth opportunity for their firms.

Moderators:

Chris Paoletta

Managing Director, OCIO
Invesco

Amanda Tepper

Chief Executive Officer
Chestnut Advisory Group

Speakers:

Stephen Beinhacker, CFA

Managing Director, Global Head of Manager Research
SEI

Andrew Junkin, CFA, CAIA

President, Wilshire Consulting
Wilshire Associates

David Kelly, CFA, FIA, FSA

Partner, Chief Investment Officer for North America
Aon

2:10-2:40 pm

Grand Ballroom

Refreshment Break with Exhibitors

2:45 – 3:45 pm

Casa Grande Room

Concurrent Breakout Sessions

Track 1: Traditional Investments

ESG Investing: Measuring Impact

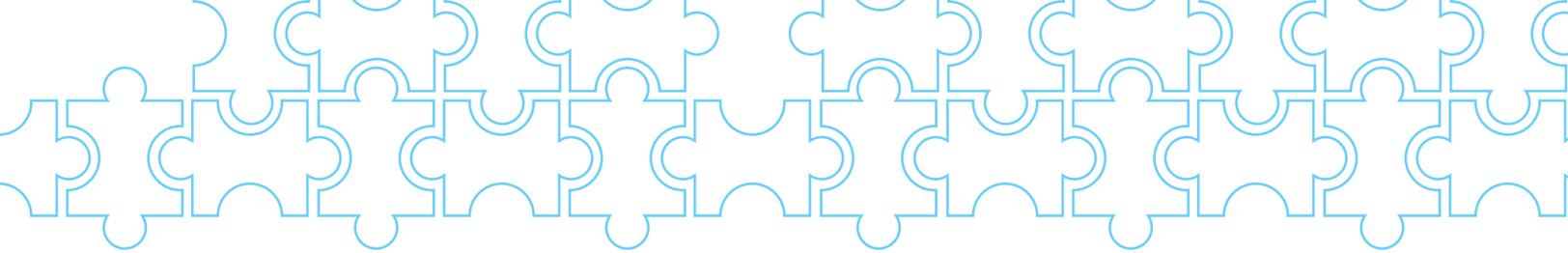
The evolution of the ESG/SRI/Impact landscape continues. Assets are increasingly being directed toward sustainable investments. Hear from industry leaders on how they view the landscape and how they have incorporated those views into their businesses. You will also learn about challenges that each industry leader has faced throughout this process. Discussion topics will include:

- Obtaining standardized ESG data
- Incorporating views on the 17 SDG's
- Impact of millennials on the ESG conversation
- How will managers be measured?
- How have you incorporated ESG factors into your decision-making process?
- What are some of the challenges you have faced as you've worked through incorporating sustainability?

Moderator:

Dr. Mariela Vargova

Senior Vice President & Senior Sustainability & Impact Analyst
Rockefeller Capital Management



Speakers:

Meredith Jones

Founder, MJ Alternative Investment Research

Partner, Global Head of Responsible Investing & Head of Emerging & Diverse Manager Research, Aon Hewitt

Tim Kavanaugh

Director of Investments

Mercy Investment Services

Colleen Smiley

Principal, Assistant Director of Public Markets Manager Research

Meketa Investment Group

Sedona Room

Track 2: Alternatives

Private Debt and Private Equity – How Do They Fit Into a Plan and What are Investors Looking For?

This will be an interactive discussion between a Private Credit research analyst, and Private Equity research analyst, a Field Consultant, and a Plan Sponsor discussing what each looks for in terms of approving, recommending, and making an investment. The discussion will shift to how a field consultant and a plan sponsor determine which manager to allocate capital to. We will also discuss whether private equity or private credit is a more attractive investment at this stage of the economic cycle- and why.

Moderator:

Dimitrios Stathopoulos

Senior Managing Director, Head of Institutional Sales

Nuveen

Speakers:

Turner Bailey

Principle

Mercer

Kevin Keneally

Deputy Chief Investment Officer

General Retirement System of the City of Detroit

Francois Otieno

Director of Credit Research

Segal Marco Advisors

Grand Canyon Room

Track 3: NextGen

CIO Magazine's NextGen/40 Under Forty Award Recipients - Throughout the Years

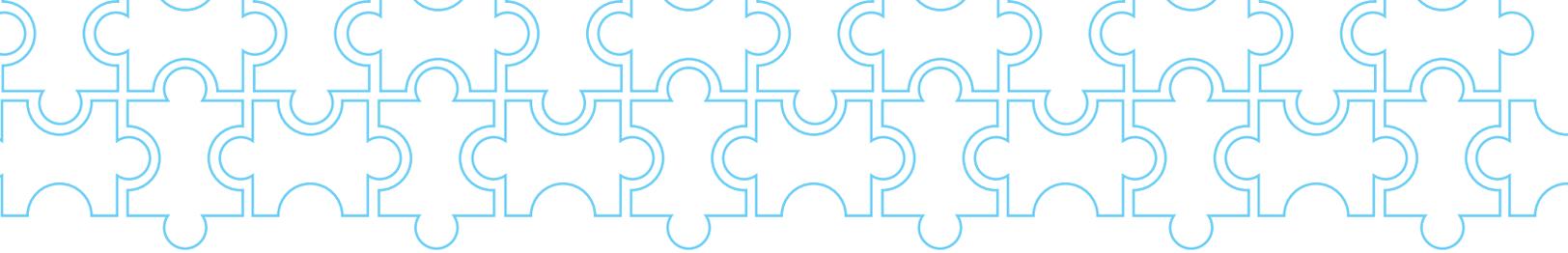
Meet the stars that have received CIO's coveted recognition. We will recognize recipients over the past few years to gain perspective on the evolution of their career. This session will cover contemporaneous topics in today's investment environment as we hear from our panelists on how they are shaping the investment landscape for future generations, how they have been shaped by their experience to date and for what they attribute their guiding light.

Moderator:

Christa Maxwell, CFA, CIPM

Director of Business Development

Kennedy Capital Management, Inc.



EXTENDED SCHEDULE (CONTINUED)

Speakers:

Chad Myhre

Portfolio Manager
Missouri Public School & Education Employee Retirement Systems

Mark-André Saucier-Nadeau

Portfolio Manager, Global Equities
Caisse de dépôt et placement du Québec

Kristin Varela

Deputy Chief Investment Officer
Public Employees Retirement Association of New Mexico

4:30-6:45 pm

Tennis Courts
Paradise Garden

Optional Outdoor Activities

- Tennis Tournament
- Volleyball Tournament

7:30-8:00 pm

Gold Room

Cocktail Reception

8:00-11:00 pm

Mesa/Flagstaff Room

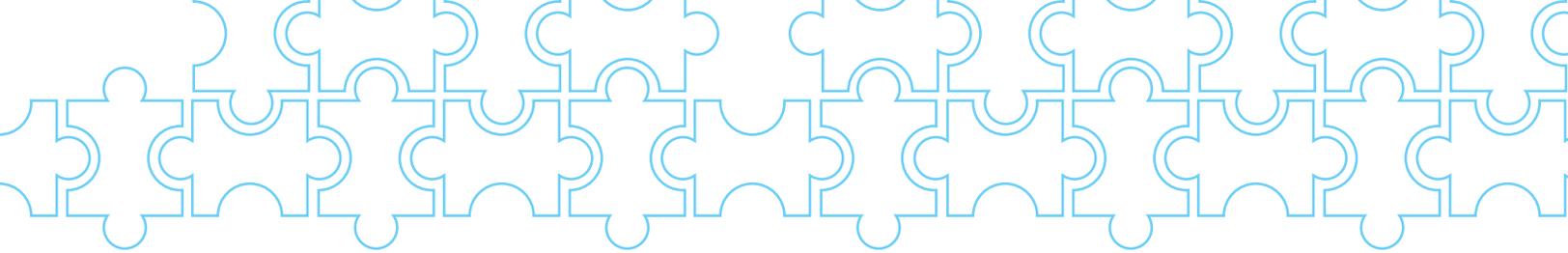
Dinner & AIMSE Lothrop Award Presentation

The prestigious Richard A. Lothrop Outstanding Achievement Award is presented each year at the AIMSE Annual Conference and is one of the most coveted honors in the investment management industry. Award criteria include dedication & service to:

- The industry
- AIMSE
- The community
- Mentorship and service to others

Lothrop Award Recipients

James Manley, Jim Manley Associates
John Sieter, Capital Guardian Trust
Sharon Hough, Pequot Capital
Michael Fisher, Barclays Global
Victor Zollo, DePrince, Race & Zollo, Inc.
Dick Graf, Corinthian Cove Consulting
Jerry Devore, Atlanta Capital Management
Frank Minard, XT Capital Partners
Eugene Waldron, Capital Guardian Trust Company
James Wood, JRW Partners
Obie McKenzie, BlackRock
John "Rick" Rockwell, T. Rowe Price
Marlis S. Fritz, AXA Rosenberg Investment Management
Dick Hoag, Corinthian Cove Consulting
Neal Howe, Welton Investment Partners
Tim McAvoy, Coho Partners
Jim Skesavage, Atlanta Capital Management
Larry Pokora, Tortoise Capital
Doreen Mochrie, Olympic Peak Asset Management



TUESDAY, APRIL 30

7:00 am-1:00 pm

Conference Registration

Arizona Biltmore
Ballroom Foyer

7:00-8:00 am

Breakfast with Exhibitors & AIMSE Annual Business Meeting

Grand Ballroom

8:00-9:00 am

Keynote Presentation by Colette Carlson: Stress Less, Connect More

Mesa/Flagstaff Room

The truth is whether you are in leadership, in sales, or on the front line, you are expected to produce more in less time with fewer resources, while staying positive and connected with colleagues, customers and clients. The reality is we are all stressed out, tightly wound, and exhausted trying to meet and exceed expectations. People have the best intentions that seem to go out the window before lunch as they are constantly changing schedules, demands, and priorities. Enough already! Create the focus, energy, and mindset necessary to make healthy choices and stay connected to those who count.

It's no longer about time management, it's about YOU management. Get ready to laugh-out loud and walk away ready to make positive, long-lasting change the next day.

9:00 – 10:00 am

Institutional Investment Consultants and Wealth Management: The Path of Convergence

Mesa/Flagstaff Room

As the Investment Consulting community looks to expand practices outside of traditional Institutional markets, this panel will examine how firms are establishing relationships and influence with wealth management intermediary's such as broker dealers, RIAs, private banks, family offices, etc. We will focus specifically on which firms are active in the space, the services they are providing to the wealth segment, how the business is likely to evolve, and of course, strategies that asset managers are pursuing to take advantage of this changing industry dynamic. The panel will include consultant's active in the space, their clients, and be moderated by a CR professional at a money manager with a significant Wealth Management presence.

Moderator:

Leonard Oremland

Managing Director, Head of Global Consultant Relations
OFI Global Asset Management

Speakers:

Joseph Cortese, III

Senior Consultant & OCIO Financial Institutions Practice Leader
DiMeo Schneider & Associates

Preston Dillard, CAIA

Director & Portfolio Manager, Strategic Advisory Group
Thompson, Siegel & Walmsley

David Hyman, CFA

Partner & US Wealth Manager Solutions Segment Leader
Mercer

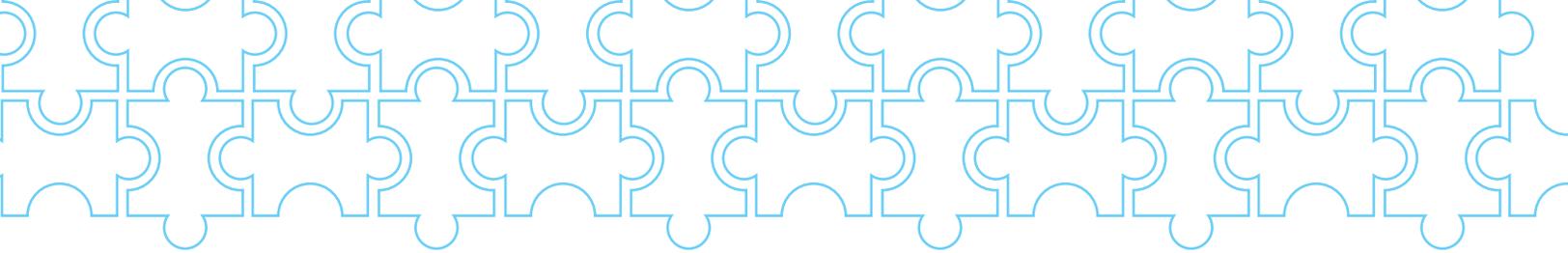
Dennis Sabo, CFA

Partner, Portfolio Manager
Edge Capital Group

10:00-10:20 am

Refreshment Break with Exhibitors

Grand Ballroom



EXTENDED SCHEDULE (CONTINUED)

10:20-11:40 am

Concurrent Breakout Sessions – Meet the Allocators Parts I and II

Please note each session is 40 minutes in length beginning at 10:20 am and repeating at 11:00 am. Attendees are encouraged to select one session per time period.

Casa Grande Room

Session 1: Moving Forward in Healthcare

For healthcare organizations, the crisis changed the way they perceive risk and liquidity. These institutions represent an evolving distribution channel for asset managers. We will explore how plans leverage resources among different groups with various pools of assets. We will dive into how the plans and consultants view volatility affecting their already complex task of planning and investing. We will address where they see opportunity and will discuss how best to cover their organizations and what to avoid. The panel will consist of a well-rounded group of investment professionals from health organizations to consultants with a focus on the space.

Moderator:

Tonja Truesdell

Regional Director, Institutional Group
Thornburg Investment Management

Speakers:

Michael Horst, CFA, CAIA

Senior Director, Investment Management
Kaleida Health

Dina Richard

Chief Investment Officer
Trinity Health

James Wesner, CFA

Managing Partner
Marquette Associates

Gary Wyniemko, CFA

Principal, Senior Consultant
NEPC

Grand Canyon Room

Session 2: Exploring the Impact of a Plan's Size and Investment Philosophy

Three institutional investors, representing large, medium, and smaller plans pursue very different strategies. These differentiated strategies are driven by their size, their specific goals, and their investment philosophies. While we will explore their differences, their investment strategies have many common themes. From the use of active vs. passive, the use of alternatives, smart beta strategies, and credit these investors will shed light on the rationale for their investment approach. Moderated by a seasoned pension plan consultant, this session will allow you to develop a better awareness of the unique situations each of these plans face.

Moderator:

Don Stracke, CFA, CAIA

Senior Consultant
NEPC

Speakers:

TJ Carlson

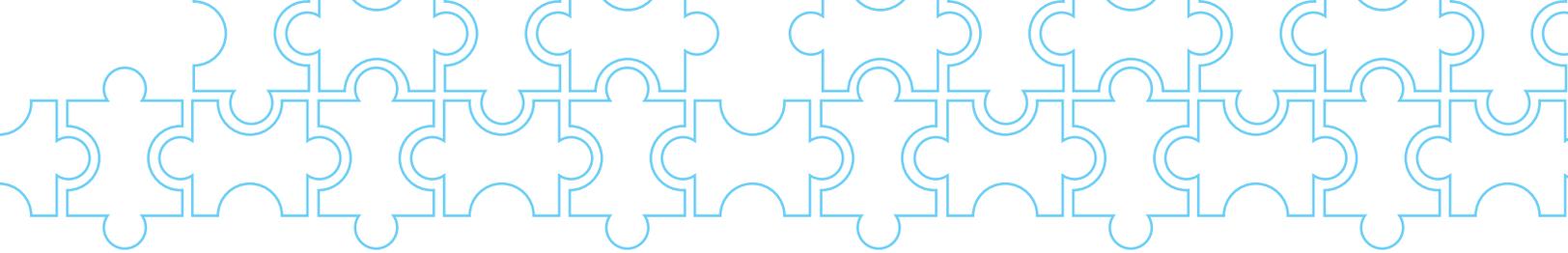
Chief Investment Officer
Texas Municipal Retirement System

Karl Polen

Chief Investment Officer
Arizona State Retirement System

Mark Steed

Chief Investment Officer
Arizona Public Safety Personnel Retirement System



Sedona Room

Session 3: Attention Pays – How to Drive Profitability, Productivity and Accountability for Sales Executives

To get the results you want, you need to get attention. But most people don't know how to get it and keep it. Neen has designed a methodology for Intentional Attention that helps sales leaders and organizations be more deliberate about the choices we make and the actions we take.

Join speaker, author, and sassy little Aussie, Neen James, and discover what makes attention valuable and why paying attention in very specific ways drives profitability, productivity, and accountability.

You'll learn:

- The three types of attention, Personal, Professional and Global and how to master each
- Strategies to design work and personal environments for optimal attention and focus
- A framework to get your team aligned, focused and executing faster than ever

Moderator:

Kurt Terrien

Managing Director, Institutional Sales
Clarkston Capital Partners

Speaker:

Neen James

Motivational Keynote Speaker
Neen James Inc.

11:50 am-1:20 pm

Mesa/Flagstaff Room

Consultant Roundtables

A hallmark of AIMSE conferences, the consultant roundtables will include a diversified group of traditional and alternative consultants. Get ready to roll up your sleeves, ask questions and listen, learn, and adapt as top consultants share their firm's priorities, manager search activities, organizational updates, and how best to communicate with research and field consultants. We bring the consultants to you and every ten minutes, the consultants will rotate from table to table to speak with you. We keep each rotation small and intimate to encourage candid conversations where your most pressing questions will be answered.

Moderator:

Tasleem Jamal, CFA

Vice President, Head of Marketing & Client Services
Sprucegrove Investment Management Ltd.

Speakers:

William Beck

Vice President
Wilshire Associates

Roger Fenningdorf, CFA

Partner, Head of Manager Research
Rocaton Investment Advisors

Margaret McRae Hoy, CFA

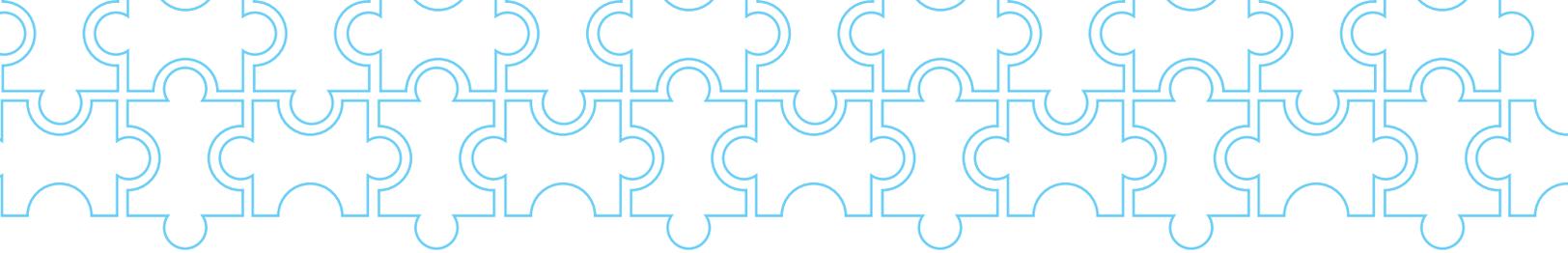
Associate Director, Public Markets
Verus

Eric Huff, CFA, CAIA

Vice President, Manager Research
LCG Associates

Spencer Hunter

Consultant
RVK, Inc.



EXTENDED SCHEDULE (CONTINUED)

Russell Ivinjack

Senior Partner
Aon

Nat Kellogg, CFA

Director of Manager Search, Managing Partner
Marquette Associates

Jacob Meese, CFA

Consultant
Cardinal Investment Advisors

Colleen Smiley

Principal, Assistant Director of Public Markets Manager Research
Meketa Investment Group

Eric Thielscher, CFA

Global Head of Public Investments
Cambridge Associates

Greg Ungerman, CFA

Senior Vice President, DC Practice Leader
Callan

1:20-2:20 pm

Grand Ballroom

Networking Lunch with Exhibitors

3:00-7:00 pm

Transportation Departs
from Main Lobby

Post-Conference Volunteer Activity at The Society of St. Vincent de Paul

468,000 families are in need across Arizona. The Society of St. Vincent de Paul dining rooms give those in need a chance to have a sit-down meal, but it's more than that ... When you visit to serve or be served, it's rarely just about eating. Volunteers create an experience many of us take for granted, an opportunity not only to eat but to meet and greet as well. It's also a chance to discover other ways to help our guests. Stomachs and hearts are filled in five dining rooms, where 3,500 nourishing, hot meals accompany our hospitality every day.

Duties will include but are not limited to: room preparation, setting up tables and chairs, greeting guests, preparing salad, pastries, and bread, plating food on a hot food line, waiting on tables, distributing silverware, napkins, and cups, sorting / giving out essential items to guests (e.g. clothing, hygiene kits, etc.), clean up (e.g. busing tables, mopping, taking out garbage, washing dishes, etc).

Pre-registration is required in order to participate. On-site registration is not available for this activity. AIMSE will provide transportation between the Arizona Biltmore and The Society of St. Vincent de Paul dining room. Closed-toe shoes with rubber soles required.

MARKET LENS

In your efforts to win and retain institutional assets, you need early and accurate intelligence that gives you visibility into:

- ✓ Opportunities before they're widely known in the market
- ✓ How competitors are positioning their products
- ✓ Investor and consultant perceptions of your firm, your products and your competitors

Stop by our booth or catch us during a break to learn how to be more proactive when preparing for prospecting and pitches.

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES

Conference Co-Chairs



Heather Beatty, Co-Chair

Vice President
First Eagle Investment Management

Heather is a vice president on the Institutional team at First Eagle Investment Management and is responsible for managing relationships with institutions and consultants primarily in the Midwest and on the West Coast. Prior to joining First Eagle in March 2016, she was a senior vice president at TCW and, before that, co-director of global consultant relations for Thornburg Investment Management. At both firms, she focused on managing and cultivating consultant and institutional relationships. Heather began her career in investment management at Palisades Investment Partners, where she drove all efforts related to institutional business development, client service and marketing. She is a graduate of Miami University of Ohio and holds her Series 7 and Series 66 licenses.

Heather is involved in several national and regional organizations. She is a co-founder of Women in Institutional Investments Network (WIIIN), a Los Angeles-based 501c3, and a board member at the Association of Investment Management Sales Executives (AIMSE).



Tony Buscemi, Co-Chair

Partner
Gallatin Capital

Tony Buscemi is a Partner of Gallatin Capital LLC. Prior to co-founding Gallatin Capital in May 2003, Mr. Buscemi was at Moore Capital with responsibilities in client services and new business/product development. Mr. Buscemi joined Moore Capital after working closely with the firm in his prior position as Vice President of the Financial Institutions Investment Banking Group within the Chase Manhattan Bank's Securities Division. In that capacity, he was responsible for executing domestic and cross border equity private placement transactions for both insurance companies and investment management firms, as well as the structuring and execution of mergers and acquisitions. Mr. Buscemi joined Chase in 1991 as an Associate in its Global Project and Trade Finance Group and was promoted to Vice President in 1995 after completing Chase's Associate Development and Credit Analyst training programs. Mr. Buscemi graduated magna cum laude with a Bachelor of Business Administration degree from Northwood University and earned his Master of Business Administration degree in Finance from the Stern Graduate School of Business at New York University.

Moderators, Speakers & Conference Committee

*Indicates Annual Conference Committee Member



Erin Archer, CFA

Treasurer
DePaul University

Erin Archer was named treasurer of DePaul University in January 2018. In this role, she oversees the treasury operations and liquidity management functions of the university, administers its endowment and other investment holdings, oversees the institution's capital finance strategy and manages its debt portfolio. Archer also manages the commercial real estate of the institution and is responsible for the acquisition, disposition and leasing of its fixed assets. Since joining the university in late 2015, Archer has served as director of investments, associate treasurer and most recently, as interim treasurer.

In her prior career, Erin was an equity research analyst at various banks including Goldman Sachs and HSBC. She covered the US financial sector through 2008 from the Midwest, emerging EMEA initial public offerings from London, and Sub-Saharan African food and beverage companies from Johannesburg.

Erin holds an MBA in finance and economics and a BA in biological sciences, both from the University of Chicago. She is a CFA Charterholder.



Turner Bailey

Principle
Mercer

Turner Bailey is a Principle and Manager Research Consultant in the Mercer Alternatives Group, focused on private markets. His primary duties include research, manager due diligence, and monitoring of private equity investments. Prior to joining Mercer Turner was a Senior Vice President at Fortress Group, Inc. where he was responsible for marketing a broad range of private investment funds to endowments, foundations, family offices, and corporate and public defined benefit plans. Before Fortress Group, Turner was an Assistant Vice President at AllianceBernstein, a global asset management firm, responsible for sales and client service with middle market institutional investors. Early in his career, Turner held various roles in the Institutional Investment Management group at AllianceBernstein, including managing the firm's relationships with global and national investment consulting firms and providing analytical support to AllianceBernstein's client-facing professionals and portfolio managers. Turner holds a B.B.A. in Finance with a Math minor from Loyola University and Series 7, 63, 79 licenses.



William Beck
Vice President
Wilshire Associates

Will Beck is a vice president of Wilshire Associates and a member of Wilshire's Manager Research Group. Mr. Beck has 10 years of industry experience and his research coverage is primarily focused on core/core plus, as well as global and emerging market fixed income. Prior to joining Wilshire Associates in 2010, Mr. Beck worked as a tax analyst at Fidelity Investments. He began his career at Interoute Communications building strategic financial forecasting models.

Mr. Beck earned his BA in business administration with an emphasis in finance from the University of Colorado, Boulder and holds an MS in Finance from the University of Notre Dame.



Janet Becker-Wold, CFA
Senior Vice President & Manager
Callan

Janet Becker-Wold, CFA, is a Senior Vice President and the Manager of Callan's Denver Fund Sponsor Consulting office and a shareholder of the firm. Janet joined the investment management business in 1991. Her experience at Callan includes all facets of investment consulting including investment policy analysis, asset and liability studies as well as manager search and structure. She has a particular expertise in international investing and currency management. Her clients include defined benefit, defined contribution, non-profits and endowment/foundation. Janet co-Chairs Callan's Manager Search Committee and is a member of Callan's Management, Institute Advisory and Defined Contribution committees and is a shareholder of the firm.

Janet joined the firm in 1994 from Qwest's (formerly U S WEST) pension fund where she worked in the international equity, fixed income and real estate areas. While at Callan, she has authored white papers on a variety of international investing issues and is a speaker at industry forums. Janet was named Money Management Letter's 2003 Consultant of the Year.



Stephen Beinhacker, CFA
Managing Director, Global Head of
Manager Research
SEI

Stephen Beinhacker serves as Managing Director of the Manager Research team. In this role he is responsible for overseeing manager selection across all traditional asset classes including equity, fixed income and multi-asset. From April 2012 to April 2014 he served as Head of Global Equity for SEI. Stephen is a member of IMU Investment Strategy Oversight Committee.

Prior to his current responsibilities, Stephen spent nearly two decades at AllianceBernstein, first as a Senior Portfolio Manager overseeing more than \$10bln in International and Global Growth equities, and later as Chief Investment Officer for Emerging Markets Growth. In the latter role, he led a team responsible for asset management and product development for both institutional and retail clients. He also managed a U.S. Equity L/S portfolio for Lehman Brothers.

Stephen holds a Bachelor of Science in Mathematics/Computer Science from Binghamton University and a Master of Business Administration from New York University's Stern School of Business. Mr. Beinhacker is a CFA Charterholder.



Nadejda Bojinova*
Head of Sales
Dynamic Beta Investments

Nadejda Bojinova is Head of Sales at Dynamic Beta Investments, a liquid alternative investment firm based in New York. Previously she was with Nikko Asset Management and oversaw relationships with institutional investors and investment consultants in North America. Prior to Nikko she was with IKOS, a global macro hedge fund based in Europe and was responsible for marketing CTA, market neutral and currency investment products to global investors. Nadejda's finance experience includes positions with Trinity Funds, UBS and Merrill Lynch.

Nadejda graduated from Massachusetts College of Liberal Arts magna cum laude.



Kirill Buzinov
Associate, Absolute Return
Perella Weinberg Partners

Kirill Buzinov is an Associate at PWP and a member of Agility's Absolute Return Team where he assists with investment manager due diligence, asset allocation, and market analysis. Prior to joining PWP, Kirill worked at the University of Colorado Treasury, where his responsibilities included assisting the treasurer in allocation and reinvestment of earnings in a \$1.5+ billion fund, performing portfolio and daily liquidity budget reconciliations, and conducting investment research. He holds a B.S. in Finance and a Certificate in Commodities from the University of Colorado Denver. Originally from Russia, Kirill enjoys skiing, traveling, and practicing Kendo. He is also a member of the Young Professionals Council at Denver Kids, a local non-profit that supports K-12 students in the Denver Public School system who face the challenges of a high-risk environment.

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES (CONTINUED)



Mark Cagwin, CFA, CPA

System Director, Treasury & Investments
SSM Health Care Corporation

As the SSM Health Director of Treasury & Investments, Mark oversees all asset allocation, risk management and investment diligence responsibilities for the organization's \$4.5 billion investment portfolio. Mark started his career in 2005 as a financial statement auditor at PricewaterhouseCoopers ("PwC") where he achieved Certified Public Accountant ("CPA") designation. Cagwin also obtained his Chartered Financial Analyst ("CFA") designation in 2016. At PwC, Cagwin was the lead audit manager for Harbour Group, the largest private equity investment manager in St. Louis. Cagwin continued his career at BJC Healthcare ("BJC") in St. Louis, where he initially led all technical accounting and financial reporting for the health system. Within the BJC Treasury team, Cagwin oversaw all operational due diligence procedures, custody management and conducted equity/fixed income investment due diligence for the team. Cagwin has been with SSM Health since 2015.



Colette Carlson

Keynote Speaker

Colette Carlson is a human behavior expert and keynote speaker who inspires individuals to connect and communicate in real and relevant ways. How to create effective connections, and leverage them for greater success, is the thread that is woven into every one of Colette's presentations.

With a Master's Degree in Human Behavior, a fascination with communication trends, and extensive experience in the personal development industry for over 20 years, Colette knows the difference between trendy topics and timeless truths when it comes to successful business practices.

Colette is a Certified Speaking Professional (CSP), a designation held by fewer than 10% of the members belonging to the International Federation for Professional Speakers. Her articles have been featured in Success, Business Management Daily, and Working Mother magazines.

Through her real-world, highly-engaging, and laugh-out-loud funny seminars, Colette teaches organizations how mindful communication creates powerful connections. Every presentation is customized and personalized, and audience members learn how to form and sustain connections that drive productivity, engagement, and collaboration. From the top leadership to the front line, it's all about the power of connection.

Every person at every level of an organization benefits from the power of connection. Most importantly, that power begins within. The awareness and discipline of connecting with yourself first, in

order to genuinely connect with others, is what Colette inspires in people everywhere.

Colette grew up in Chicago and now lives in San Diego, but she still prefers pizza over tofu.



TJ Carlson

Chief Investment Officer
Texas Municipal Retirement System

T.J. is the Chief Investment Officer for the Texas Municipal Retirement System (TMRS) in Austin Texas. TMRS is a \$29 billion statewide retirement system established in 1947 that

provides retirement, disability, and death benefits for employees of participating Texas municipalities.

Since joining TMRS in 2013, T.J. has built an extremely experienced professional investment team of 24 and has overseen TMRS' diversification efforts into new investment areas including Absolute Return Strategies, Private Equity, Non-Core Fixed Income and Real Assets.

Prior to joining TMRS, T.J. was the Chief Investment Officer for the Kentucky Retirement System and for the West Virginia Investment Management Board. He also served as a Principal at EnnisKnupp, was the Chief Investment Officer and Treasury Director at the Marshfield Clinic and was a Sergeant in the USMC and Reserves.



Gus Catsavis, CFA*

Managing Director
Pinnacle Asset Management, L.P.

Prior to joining Pinnacle in June 2008, Mr. Catsavis was a Principal at Focus Capital Management LLC from February 2000 to May 2008. From July 1986 to January 2000, he was the President of Asset

Consulting Group, Inc. Mr. Catsavis received a B.A. in Economics from Southern Methodist University and an MBA in Finance from Washington University.



Sean Clark, CFA*

Senior Vice President- Institutional Sales &
Consultant Relations
Westwood Holdings Group

Mr. Clark joined Westwood in 2019 and serves as Senior Vice President, Institutional Sales & Consultant Relations. He has over 25 years of financial services industry experience across asset management, investment consulting and trust services.

Prior to joining Westwood, Mr. Clark spent over seven years as Senior Vice President, Consultant Relations with OFI Global Asset Management, an OppenheimerFunds company, covering global

and regional consultants and assisting with the firm's institutional sales efforts. His experience also includes roles as Managing Director of Consultant Relations at John Hancock Funds, Head of Consultant Relations at Deutsche Bank/DWS Investments, Director of Institutional Sales & Marketing at High Pointe Capital Management, Regional Sales Director with Safeco Asset Management and VP, Senior Investment Consultant, with the Northern Trust Company. Mr. Clark has also served as a board member with the Defined Contribution Institutional Investment Association.

Mr. Clark holds a B.A. degree in English from the College of the Holy Cross and an MBA in Finance from DePaul University's Kellstadt Graduate School of Business. He is also a CFA charter holder and is a member of the CFA Institute, the CFA Society of Chicago and is a regional representative for the Association of Investment Management Sales Executives. Mr. Clark has served as a board member with Snow City Arts in Chicago, a not-for-profit organization providing arts education to hospitalized children; as a member of the Illinois Department of Public Health Genetic & Metabolic Disease Advisory Committee; and as a volunteer with Children's Miracle Network Hospitals. Additionally, he is a Registered Securities Representative and Principal (FINRA Series 7, 24 and 66).



Joseph Cortese, III

Senior Consultant & OCIO Financial Institutions Practice Leader
DiMeo Schneider & Associates

Joe joined DiMeo Schneider in 2008. He provides investment consulting services to family offices, nonprofit organizations, high net worth investors, and other financial institutions as part of the firm's Outsourced Chief Investment Officer (OCIO – Financial Institutions) practice. Joe gives advice and expertise on all facts of effective investment program design including establishing investment objectives, asset allocation and portfolio design, investment research and due diligence, and overall practice management. Joe is also a member of the firm's Private Markets Research Team. Prior to joining the firm, Joe worked for Morgan Stanley's Private Wealth Management Office and as a Managing Director for an investment management firm implementing a value-focused, long/short equity strategy based on University of Chicago Booth research. Joe earned his MBA with concentrations in Analytic Finance and Accounting from the University of Chicago Booth School of Business and a BBA with a Certification in Entrepreneurial Management from the University of Iowa. Joe is a member of UNICEF's NextGen Junior Board and The University of Iowa's J.P.E.C. Alumni Board, as well as Co-Founder of the Hawkeye Business Development Group of Chicago. Joe is also currently servicing as Director-at-Large and Secretary of the University of Chicago Booth School of Business Alumni Club.



Preston Dillard, CAIA

Director & Portfolio Manager,
Strategic Advisory Group
Thompson, Siegel & Walmsley

Preston Dillard is the Director of TSW's Strategic Advisory Group. Preston advises institutions, families and individuals in the development and implementation of financial strategies. With over 18 years of experience in the financial services industry, Preston has worked closely with clients around the country ranging from non-profits and individuals, catering to each of their unique circumstances.

Prior to joining TSW in 2005, Mr. Dillard was a Portfolio Manager at Bank of America Private Bank managing multi-asset portfolios. Formerly, he was employed by a Richmond based broker-dealer as an investment advisor.

Preston is active in the community and serves on the Board of Drive to Work, Advisory Board of the Massey Cancer Center and The Investment Committee for The Virginia Home.

Preston is a graduate of the University of Virginia and holds the Chartered Alternative Investment Analyst® designation. Preston is currently registered with FINRA and is registered as an Investment Adviser Representative.



Roger Fenningdorf, CFA

Partner, Head of Manager Research
Rocaton Investment Advisors

Roger Fenningdorf, Principal, is responsible for setting the firm's manager research agenda and also spends a significant amount of his time researching hedge fund and U.S. equity strategies and managers. Roger joined Rocaton in 2002 after 8 years at Barra RogersCasey where he served as Managing Director, Head of Global Manager Research, and served as portfolio manager for two fund of funds strategies. Roger is a holder of the CFA designation and a member of the CFA Institute and the Stamford Society of Financial Analysts. Roger earned an M.B.A. in Finance and International Business from Yale University School of Management and a B.A. in Economics from Tufts University.



Thomas Foster, CFA

Director, Pension & Trust Investments
Pinnacle West Capital Corporation

Mr. Foster holds the position of Director, Pension and Trust Investments at Pinnacle West Capital Corporation in Phoenix, Arizona. In that role he manages the investment of over \$6 billion in pension, post-retirement medical, nuclear decommissioning, foundation and 401(k) assets. He is the company's primary contact for relationships with investment managers, investment consultants and trustees.

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES (CONTINUED)

Mr. Foster has held this position for 8 years. Prior to joining Pinnacle West he spent twenty years performing the same function with the Berkshire Hathaway subsidiary MidAmerican Energy Company based in Des Moines, Iowa. Prior to that Mr. Foster taught investments, finance and economics at the University of Iowa and Iowa Wesleyan College and also served on the staff of the public utility regulatory commission in the state of Iowa.

Mr. Foster is a CFA charter holder, a former president of the CFA Society of Iowa, a former chairman of the board of the CFA Society of Iowa, a current member of the Phoenix CFA Society, the CFA Institute and a member of the American Economic Association. Mr. Foster holds a Bachelor's degree in Finance and a Master's degree in Economics.



Bridget Gaffney*

Institutional Sales
First Eagle Investment Management

Bridget is a Sales Associate on the Institutional team and is responsible for helping develop and manage strategic relationships with institutions and consultants primarily in the Midwest and on

the West Coast. Prior to joining the firm in May 2017, Bridget was an investor relations associate at EnTrustPermal supporting the institutional, retail, and international sales teams in maintaining and cultivating client relationships. Prior to this, she worked as a corporate analyst for the ad agency Mindshare. Bridget received her bachelor of science in finance with a minor in mathematics from the University of Connecticut.



Michael Gillis*

Vice President & Director, Institutional Relationships
TD Greystone Asset Management

Michael Gillis is Vice President and Director, Institutional Relationships for TD Greystone Asset Management.

Immediately prior to joining Greystone, Michael held the position of Vice-President Institutional Marketing and Sales for a number of years with Seamark Asset Management. Previously, he worked for the Halifax Grammar School for 2 years, as a Teacher. Michael has also worked as a Director of Business Development for National Trust, and has held the position of Senior Account Representative for both Royal Trust and National Trust.

Michael's professional credentials include a Bachelor of Education, which he completed at Mount Saint Vincent University and a Bachelor of Business Admin., which was obtained from St. Francis Xavier University.

Michael is also an active board member for the Association of Investment Management Sales Executives (AIMSE) and Benefits and Pensions Monitor. Michael is also actively involved in the Canadian Benefits and Pension Institute (CPBI), the Association of Canadian

Pension Managers (ACPM), the Canadian Association of University Business Officers (CAUBO), and the International Foundation of Employee Benefits (IFEFP). Michael serves on the board of two charities, MAGICANA and Georgetown Walk for Wishes (Ontario).



Marni Harp*

Head of Institutional Consultant Relations,
North America
Schroders Investment Management

Marni Harp, Head of US Institutional Consultant Relations, leads Schroders consultant team and is responsible for the firm's relationships with the

US consultant community. Based in Los Angeles, Marni joined Schroders in 2016 to manage Schroders interactions with national and regional consultant firms headquartered in the Western US. Prior to Schroders, Marni was a Consultant Relations Director at Deutsche Asset Management from 2015 to 2016, and Co-Head of Institutional Consultant Relations at American Century Investments from 2005 to 2015. Marni was also a Senior Vice President at Essex Investment Management from 2000 to 2005 responsible for raising institutional assets from asset owners and consultants. Earlier in her career, Marni was a Senior Treasury Analyst at The Walt Disney Company.

Marni holds her Series 7, 6, & 63 licenses. She received her undergraduate degree from the University of Arizona and her Masters in Business Administration from USC Marshall School of Business.



Michael Horst, CFA, CAIA

Senior Director, Investment Management
Kaleida Health

Michael has over two decades of investment experience managing both public and private investment pools. During his career, he has managed pension, foundation, endowment,

insurance and defined contribution portfolios. In addition, Michael has managed the operating cash and treasury functions including overseeing debt issuances.

Michael joined Kaleida Health in 2017 to build their internal investment office. In his first year, he successfully rebid the investment consulting contract, hired an analyst, implemented a due diligence process, and re-wrote the Investment Policy. Currently, Michael and his analyst are rebalancing their portfolios to the new policy targets and year to date 2019 returns are ahead of their benchmarks.

Prior to Kaleida Health, Michael was part of the team that insourced

and provided oversight of Cleveland Clinic's investments. At the Cleveland Clinic, Michael was primarily responsible for the Absolute Return and Real Asset allocations. Before his time at the Cleveland Clinic, Michael spent five years building and managing Texas Tech University System's investment office. Michael began his career by establishing the Denison University investment office. During his eleven years at Denison, the endowment and the spending distribution grew over threefold. At the time of his departure, Denison's 10-Year investment return ranked in the top decile of the NACUBO endowment survey.

Michael holds an undergraduate degree from Grove City College and a graduate degree from Miami University. Additionally, he is an active CFA and CAIA charter holder.



Eric Huff, CFA, CAIA

Vice President, Manager Research
LCG Associates

Mr. Huff joined LCG in 2006 and is Vice President, Manager Research. He directs the effort on sourcing investment strategies and conducting qualitative as well as quantitative manager due

diligence. He covers traditional and alternative asset classes. Eric also assists with asset allocation modeling and capital market research. In addition, he works with several clients. Eric joined LCG as a Consultant.

Eric was previously with Hewitt Investment Group (now Aon) as a Senior Investment Analyst. He was responsible for providing investment education, conducting qualitative and quantitative due diligence with a focus on private real estate investments, and analyzing performance. Eric started his career as a Business Analyst for Hewitt.

He is a CFA Charterholder, and an active member of the CFA Institute and CFA Society of Atlanta. He is also a Chartered Alternative Investment Analyst (CAIA) Charterholder.

Eric graduated from the University of Georgia ("UGA") with a B.B.A. in Finance. He was on the Dean's List several times. While at UGA, Eric was an active member of the Delta Sigma Pi business fraternity and served as class Treasurer. Currently, Eric serves on the Board of UGA's Student Managed Investment Fund. In his free time, he enjoys spending time with his family along with playing golf.



Spencer Hunter

Consultant
RVK, Inc.

Spencer joined RVK in 2008 and is located in the Portland office. In 2014, he was promoted to Consultant, in 2017, he was named Department Manager of our Associate

Consultant/Investment Associate group, and in 2019, he was promoted to Senior Consultant.

Spencer's career at RVK has been focused on providing investment consulting advice to many of the firm's endowment and foundation, public fund, Taft Hartley, high-net-worth families, and corporate clients. His responsibilities include asset allocation and policy setting, investment manager research and due diligence, forward-looking capital market assumptions, asset class portfolio structuring, and many of the firm's internal research projects.

Spencer graduated cum laude from Linfield College with a degree in Finance. He is a shareholder and serves on the firm's Board of Directors.



David Hyman, CFA

Partner & US Wealth Manager Solutions Segment
Leader
Mercer

David Hyman is a Partner and senior consultant in Mercer's Investments business and leads the US Financial Intermediaries segment. David assists his clients in developing and implementing their unique investment strategies to help them meet their long-term goals and objectives. David is a voting member of Mercer's internal Wealth Management Strategic Research Team, the Domestic Equity Research Ratings Review Committee and chairs the Equity Strategic Research Team.

David joined Mercer in 2011 after having worked at Evaluation Associates since 1999. Prior to joining Evaluation Associates, David worked as an investment research analyst at American Planning Group, a financial planning and asset management firm that serves high-net-worth individuals.

David received an AB in Communications and Political Science from the University of Michigan and an MBA in Finance from the Leonard N. Stern School of Business at New York University. He holds the Chartered Financial Analyst (CFA®) designation and is a member of the CFA Institute and the New York Society of Security Analysts; David also holds the Series 3 and Series 30 licenses. David serves as an Investment Committee member of the Westport (CT) Public Library.



Ron Insana

Luncheon Speaker
Schroders Investment Management

A financial journalist who stands alone among his peers in having the experience of working for and running his own hedge fund, Ron Insana offers clear, unvarnished insights on the ever-changing status of the economy. Currently host of a nationally-syndicated daily radio updates and a senior analyst and commentator for CNBC, Insana has access to all of the top financial players in Washington and on Wall Street and translates the market signals and political maneuvers into information everyone understands. His hands-on experience in the financial industry—through some of the markets'

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES (CONTINUED)

most turbulent times—give an added depth of perspective that few analysts can match. He offers practical advice on what individuals and businesses can and should do now to protect what you have and to find opportunities in any type of market condition. Insana is the author of *Traders' Tales*, *The Message of the Markets*, *TrendWatching* and most recently *How to Make a Fortune from the Biggest Bailout in U.S. History: A Guide to the 7 Greatest Bargains from Main Street to Wall Street*. Ron Insana is a contributor to CNBC and MSNBC, where he discusses the most pressing economic and market issues of the day.

He also delivers *The Market Scoreboard Report* to radio stations around the country. He has written for *Money* magazine and *USA Today* and has hosted two nationally syndicated radio programs.

For over three decades, Insana has been a highly respected business journalist who began his career at the Financial News Network in 1984 and joined CNBC when FNN and CNBC merged in 1991.

He has written four books about Wall Street, focusing on its history, its meaning to Main Street and its culture. From 2006-2008, Insana was CEO of Insana Capital Partners, an alternative asset manager. In addition, Insana served briefly as a managing director at Steve Cohen's SAC Capital, now known as Point72 Asset Management. Insana was named one of the "Top 100 Business News Journalists of the 20th Century" and was nominated for a news and documentary Emmy for his role in NBC's coverage of 9/11.



Russell Ivinjack
Senior Partner
Aon

Russ serves as the primary consultant to a number of the firm's largest retainer clients. He also chairs the U.S. Investment and the U.S. Management Committees and manages the practice's Client Solutions teams. He previously led the development of our alternatives investment capabilities and headed our global manager research teams.

Russ' recent activities include:

- Assisted the United States' largest retirement system, a \$525 billion public fund defined contribution plan, completed a comprehensive investment program review, which included evaluating the appropriateness of adding new asset classes/fund types and assisting with a strategic investment operations review.
- Completed a Benchmarking and Best Practices Review of Mexico's \$180 billion and 55 million participant National Retirement System.
- Assisted multiple billion dollar plus clients conduct searches for U.S. equity, international equity, fixed income, and alternative investment managers, including infrastructure, real estate, and private equity.

- Worked with Central Bank of Chile to review best-practices in securities lending, foreign exchange transactions and custodian services.
- Frequent speaker on the topic of alternative investments, defined contribution plans and the evolution of the investment consulting industry at industry conferences.

Prior to joining the firm in 1994, he spent nearly two years in SEI Corporation's performance evaluation area.

Russ holds a B.S. degree in Finance from Northern Illinois University and an M.B.A. degree from DePaul University's Kellstadt Graduate School of Business.



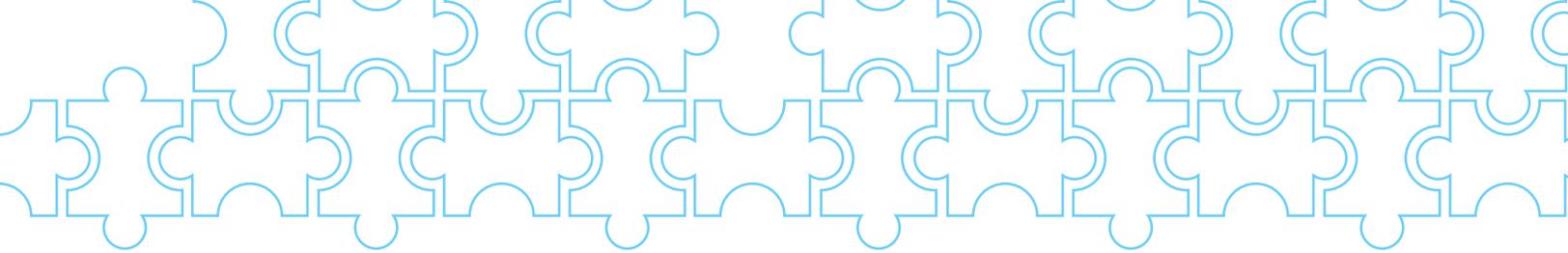
Tasleem Jamal, CFA*
Vice President, Head of Marketing &
Client Services
Sprucegrove Investment Management Ltd.

Ms. Jamal graduated from McMaster University with Bachelor of Commerce and Bachelor of Arts (Psychology) degrees in 1996 and with an MBA (Finance) in 1999. In 1998, Ms. Jamal joined Ernst & Young Investment Advisory Services as an Investment Analyst and in 2000 she was promoted to Vice President. In this role she provided investment consulting services and managed the performance reporting team of analysts. In 2003, she joined Hewitt Associates as an Investment Consultant providing a variety of institutional client's investment consulting services including asset allocation, investment policy development, manager reviews and searches. In 2007, she joined Burgundy Asset Management where she focused on client relationship management and business development for Burgundy's Canadian institutional clients. Ms. Jamal was appointed Vice President of the firm in July 2010.

Ms. Jamal joined Sprucegrove in 2010 as Vice President, Marketing & Client Services and was promoted to Vice President, Head of Marketing & Client Services in 2014, overseeing all the firm-wide Marketing & Client servicing initiatives. Ms. Jamal was appointed to the Business Management Committee in 2014, which is responsible for the day to day management of Sprucegrove.

Ms. Jamal is a CFA charterholder. Ms. Jamal has also studied in the Executive Education programs of the Harvard Business School, Columbia University Graduate School of Business and the CFA Institute.

Ms. Jamal is an active board member for the Association of Investment Management Sales Executives (AIMSE) and is also a member of the Toronto CFA Society and the CFA Institute.



Neen James

Motivational Keynote Speaker
Neen James, Inc.

Neen James is the author of *Folding Time™* and *Attention Pays™*. She has been named one of the Top 30 Leadership Speakers by Global Guru several years in a row because of her work with

companies like Viacom, Comcast, and Abbot Pharmaceuticals among others. Neen has boundless energy, is quick-witted and always offers powerful strategies for paying attention to what matters so you can get more done and create more significant moments at work, and home. Neen is the kind of speaker that engages, educates, entertains, and delivers the real-world solutions that apply in your organization, your home, and your community. She also provides one-on-one consulting in a variety of leadership topics and loves serving her audiences.



Meredith Jones

Partner, Emerging and Diverse Managers,
Responsible Investments

Meredith A. Jones is a partner at Aon Hewitt Investment Consulting, focused on emerging and diverse manager research and responsible

investing strategies. She is also an internationally recognized researcher, writer, blogger speaker and expert in the alternative investment industry. She is the author of *Women of The Street: Why Female Money Managers Generate Higher Returns (And How You Can Too)*, which won an Axiom Award gold medal in 2016. She was also named as an Inc. magazine's "17 Inspiring Women To Watch" and serves on the Board of Directors for Rock the Street, Wall Street, a non-profit that provides financial and investment literacy programs to high school girls.

Over the past 20 years, Meredith has presented her original research and insights to industry participants around the world. She is a frequent speaker on the international conference circuit and has had her findings published in books and major media outlets, including the Economist, the New York Times, CNBC, the Wall Street Journal, the Financial Times, the Journal of Investing, and others.

She began her alternative investment career at Van Hedge Fund Advisors International where she was Director of Research. She continued her research at PerTrac Financial Solutions and Barclays Capital, Inc., producing groundbreaking reports on emerging managers and diversity investing, before she became Director of the Rothstein Kass Institute, an alternative investment think tank, and then a partner at Aon.



Andrew Junkin, CFA, CAIA

President, Wilshire Consulting
Wilshire Associates

Andrew Junkin is President of Wilshire Consulting and a member of Wilshire's Board of Directors.

Mr. Junkin provides strategic leadership to Wilshire Consulting and to Wilshire Associates overall as

it relates to the full spectrum of non-discretionary and discretionary (OCIO) portfolio management services available to the institutional investment community. He has been selected as a Top Knowledge Broker within the institutional consulting industry by CIO Magazine for six years in a row. Mr. Junkin is considered a thought-leader amongst his peers and has received high marks for his work to expand diversity and inclusiveness throughout the industry.

Mr. Junkin joined Wilshire in 2005. Throughout his tenure at Wilshire, he has worked directly with large institutional investors of all types: public and corporate defined benefit plans, foundations, endowments and insurance companies. He has 23 years of investment experience with the last 22 years in the consulting industry. Prior to joining Wilshire, he was director of research and senior consultant at Asset Services Company where he provided advice to institutional investors. Mr. Junkin began his career as a financial consultant with Merrill Lynch in Oklahoma City.

Mr. Junkin earned a BS from Oklahoma City University, attended business school at the Price College of Business at the University of Oklahoma, and earned his MBA from The Wharton School of the University of Pennsylvania. He currently serves on the Board of Directors of the Board of Pensions of the Presbyterian Church (USA).



Tim Kavanaugh

Director of Investments
Mercy Investment Services, Inc.

Tim Kavanaugh joined Mercy Investment Services as director of investment operations in 2010. Prior to joining Mercy Investment Services, Tim was the assistant treasurer at Saint Louis University,

where he managed the university's treasury functions including the university's investment program. Tim began his career in real estate accounting. In 1997, he joined SSM Health Care as its corporate senior accountant. He later accepted a position in the treasury department where he was responsible for the daily system banking operations. Tim, a Certified Public Accountant, holds a bachelor of science degree in business administration from the University of Missouri – St. Louis and a master of business administration degree from Maryville University.

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES (CONTINUED)



Nat Kellogg, CFA

Director of Manager Search, Managing Partner
Marquette Associates

Nat Kellogg is the director of manager search for Marquette Associates and has 17 years of investment experience. An owner of the firm, Nat has been with the company since 2010. Nat

is a member of the firm's investment committee, discretionary committee, and healthcare committee and chairs both the firm's traditional and alternative investment manager search committee.

Before joining Marquette, Nat was a senior equity analyst at Hudson Securities covering the electrical equipment and basic materials sectors. Previously, Nat was an equity analyst at Brait Specialized Funds, a small-cap focused long/short equity hedge fund. Nat holds a B.A. in history from Middlebury College and an M.B.A. from Northwestern University's Kellogg School of Management. Nat is a CFA charterholder and a member of the CFA Society of Chicago.



David Kelly, CFA, FIA, FSA

Partner, Chief Investment Officer for North America
Aon

David Kelly is a partner in Aon Hewitt Investment Consulting's US Delegated Investment Solutions (OCIO) and is the Chief Investment Officer for North America. He has responsibility for leading the

portfolio construction and implementation function for over \$110bn of delegated client assets in North America.

David has 19 years of experience in investment strategy, solutions and risk management for pension and other institutional investors.

Over the course of his career, David's clients have included large plan sponsors in financial services, energy, retail, pharmaceuticals, defense, automotive, manufacturing, and healthcare industries, as well as public plan sponsors. David is a frequent speaker at professional conferences on topics of asset-liability risk management and frozen plan strategies.

David has a BSc. in Financial and Actuarial Mathematics from Dublin City University and an MBA from the University of Chicago Booth School of Business, with concentrations in economics and finance. He is a CFA charter holder, a Fellow of the Institute of Actuaries (UK), a Fellow of the Society of Actuaries (US), and was formerly an Enrolled Actuary under ERISA.

Kevin Kenneally

Deputy Chief Investment Officer
General Retirement System of the City of Detroit



Christa Maxwell, CFA, CIPM*

Director of Business Development
Kennedy Capital Management, Inc.

Christa Maxwell, CFA, CIPM is a Director of Business Development responsible for establishing and maintaining relationships with institutions and consultants. Prior to joining KCM in August 2017, Ms.

Maxwell worked with Westwood Holdings Group focusing on business development across the western United States. Christa began her career with Thornburg Investment Management. Over her 10 year tenure with the organization, Ms. Maxwell oversaw various regions and was responsible for client service, consultant relations, and business development. Christa earned her B.B.A. in Finance from the University of New Mexico's Anderson School of Management. Ms. Maxwell is also a CFA® charter holder and currently serves on the board for the CFA® Society New Mexico and the CFA® Society San Antonio.



Tim McAvoy

Client & Consultant Relations
Coho Partners

Tim McAvoy is a member of the Client and Consultant Relations team at Coho Partners. He has over 35 years of experience in sales and client service in the healthcare and institutional money

management industries. Prior to joining Coho Partners, Tim was the Director of Sales at DePrince, Race & Zollo, a Partner and Director of Sales and Client Service at Marvin & Palmer Associates and held various sales, service, marketing and sales management roles at GlaxoSmithKline. Tim is a former AIMSE President and was the 2015 Lothrop Award recipient. He lives in the Philadelphia suburbs and is married with four children and three grandsons. Tim is also an avid tennis and platform tennis enthusiast.



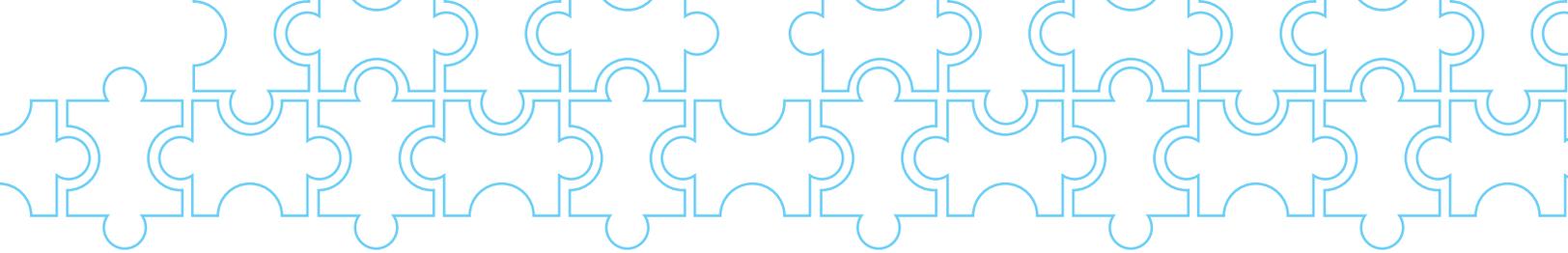
Lori McEvoy

Managing Director, Global Head of Distribution
Jennison Associates

Lorraine "Lori" E. McEvoy is a managing director and the global head of distribution. She joined Jennison Associates in December 2017. Prior to joining Jennison, Lori was the head of institutional

sales at ClearBridge Investments where she was responsible for the direction and management of institutional sales, consultant relations, and subadvisory relationships. She was also a member of the leadership team that managed the distribution and sales organization. Before joining ClearBridge, she was the head of institutional sales and service and director of consultant relations at Fred Alger Management. Prior to Fred Alger, she was the director of consultant relations at WisdomTree Investments.

Lori is a prior AIMSE Board Member and Chair of the Education Committee and AIMSE Wharton Program. She received a BS in management from Rosemont College.



Margaret McRae Hoy, CFA

Associate Director, Public Markets
Verus

Ms. McRae Hoy is a member of the manager research group, where she conducts research, analysis, and evaluation of investment managers across traditional fixed income asset classes. Ms.

McRae Hoy has over eight years of experience in performing due diligence on a wide variety of asset classes, including domestic and global fixed income, credit and currency-related strategies.

Prior to joining Verus in 2016, she worked as an investment analyst for Wells Fargo's Investment Institute where she was responsible for performing due diligence and maintaining the recommended list of managers at Wells Fargo across various global and domestic fixed income asset classes. Prior to her work at Wells Fargo, Ms. McRae Hoy held positions as traditional manager research analyst and consulting associate at Summit Strategies Group, an investment consulting firm located in St. Louis, MO, where she was responsible for asset allocation and manager due diligence for institutional clients.

Ms. McRae Hoy earned a bachelor of science (BS) with concentrations in finance and financial analysis from Saint Louis University. She is a CFA charterholder (Chartered Financial Analyst) and is a member of the CFA Society of Seattle.



Jacob Meese, CFA

Consultant
Cardinal Investment Advisors

Jake joined Cardinal in 2011 and is based in our St. Louis office. Jake's primary responsibilities at Cardinal encompass client service, asset-liability modeling, performance reporting leadership,

and investment manager research. His manager research responsibilities include investment grade core fixed income, global infrastructure, and Master Limited Partnerships (MLPs). Jake currently serves seven clients as the secondary consultant and serves two clients as the primary consultant, including a non-for-profit hospital and a workers compensation insurance company. Jake has eight years of investment consultant experience.

Prior to joining Cardinal in 2011, Jake worked at American Century Investments in the Investment Accounting and Investment Reporting departments. He holds a B.S. in Finance from Missouri State University and an MBA from Park University. Jake became a CFA charter holder in 2014.



Brittany Meisner, CFA, CAIA, CIPM*

Director, Marketing & Business Development
Segall Bryant & Hamill

Brittany Meisner is a Director of Marketing and Business Development for Segall Bryant & Hamill. Her primary responsibilities include consultant relations, client service and marketing

for institutional clients. Prior to joining the firm, Ms. Meisner was a Regional Director of Consultant Relations for Russell Investments. Ms. Meisner earned her B.S. in Business Finance from the University of Nevada, Las Vegas. She has earned the Chartered Financial Analyst (CFA) designation and the Certificate in Performance Measurement (CIPM) and is a member of the CFA Institute. Ms. Meisner has also earned the Certified Alternative Investment Analyst (CAIA) designation and is a member of the CAIA Association. She has been in the investment industry since 2011 and holds Series 7 and 66 securities licenses.



Chad Myhre, CFA, CAIA

Portfolio Manager
Missouri Public School & Education Employee
Retirement Systems

Chad Myhre is a Portfolio Manager covering public market investments at the \$44 billion Public Schools' Retirement System of Missouri.

Prior to joining PSRS, he oversaw the \$2 billion active hedge fund portfolio for the Missouri State Employees' Retirement System. Chad holds the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations.



Rich Nuzum, CFA

President, Wealth
Mercer

Rich is President of Mercer's Wealth Business, and a member of Mercer's Executive Leadership team. Rich is responsible for Mercer's delivery of investment consulting, open architecture manager-

of-managers investment management, and retirement actuarial consulting services and solutions globally. During the past 25 years Rich has provided investment advice to clients in more than 20 countries, including many of the world's largest institutional investors.

In prior roles, Rich was the President and Global Business Leader for Mercer's investment management business, global Chief Investment Officer for Mercer's investment management business, and held a variety of other leadership roles while based in Tokyo, Singapore and later New York.

Rich holds an MBA with High Honors in Analytic Finance and Accounting from the University of Chicago, and a BA with Honors in Mathematical Sciences and Mathematical Economic Analysis

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES (CONTINUED)

from Rice University. Rich also did graduate work in international economics at Tokyo University. Rich is a Chartered Financial Analyst and a member of the CFA Institute.

Rich has repeatedly been named to CIO Magazine's annual list of the world's most influential investment consultants, and received CIO Magazine's 2017 Industry Innovation Award as "Consultant of the Year".



Leonard Oremland*

Managing Director, Head of Global Consultant Relations
OFI Global Asset Management

Leonard Oremland is Senior Vice President & Managing Director of Global Consultant Relations at OFI Global Asset Management, an

OppenheimerFunds company. Mr. Oremland has over 30 years of industry experience, and leads the firm's business development / relationship management efforts with global investment consultants. These advisors collectively influence over \$36 trillion in assets across institutional and wealth management markets.

Prior to joining the firm in 2015, Mr. Oremland was a Principal at Ares Management, where he formulated and implemented business development strategies with global investment consultants and institutional investors. From 1997 to 2010, Mr. Oremland held numerous senior business development and management positions at ING Investment Management (Voya), serving as Head of Consultant Relations in his final position with the company.

He has also served in similar roles at Cowen & Company, launching his career at Merrill Lynch as an analyst and financial consultant. Mr. Oremland currently serves as co-Chair of Oppenheimer's Business Resource Group for Persons with Disabilities.

In 1983, Mr. Oremland earned a Bachelor of Arts in Business Administration from Rutgers University. He also holds FINRA Series 7, 24 & 63 licenses.



Francois Otieno

Director of Credit Research
Segal Marco Advisors

Mr. Otieno is a Director in Segal Marco Advisors' Chicago office with 18 years of institutional investment experience. He has specialized expertise in asset management, plan sponsor

advising, and investment consulting.

Prior to joining Segal Marco Advisors, Mr. Otieno served as a Senior Consultant at Aon Hewitt Investment Consulting, Inc. for nine years. In that role, he served as a senior member of the firm's manager research group focusing on fixed income, while working closely with a large number of clients in a variety of roles. Before that, he spent five years at Anthem, Inc., one of the largest

health insurance companies in the nation, as a Senior Investment Consultant overseeing the managers within the investment program. Prior to that, he spent two years at Conesco Capital Management (rebranded as 40/86 Advisors) as an Investment Analyst in the Structured Products Group.

Mr. Otieno holds a BS degree in Business Administration as well as an MBA degree from Indiana State University. He is also a Level II candidate for the Chartered Alternative Investment Analyst (CAIA) designation.

Mr. Otieno frequently speaks on various fixed income related topics at industry conferences and has been quoted in various industry publications, including Bloomberg, FundFire, and

top1000funds.com. In addition, he co-authored a research paper entitled, "Measuring Success in Fixed Income."



Anurag Pandit, CFA

Chief Investment Officer
ALSAC, St. Jude Children's Research Hospital

Anurag Pandit is the Chief Investment officer for ALSAC, the fund raising and awareness organization for St Jude Children's Research Hospital. He is responsible for managing the

Investment Portfolio of the organization in close co-operation with the Investment Committee, Investment Consultant, and Executive Leadership Team. He oversees the operations and staff of ALSAC's investment team. In addition, he has served as a Board Member of the CFA Society of Memphis since 2016 and has been affiliated as adjunct faculty at the Fogelman School at the University of Memphis

Prior to joining ALSAC in June 2015, Mr. Pandit accumulated more than 25 years investment experience in multiple investment disciplines. He spent the past five years as a Director of Investments and a senior member responsible for setting up a new investment office to manage Boston Children's Hospital \$3 billion Endowment and Pension Plan. Prior to Boston Children's Hospital, he was the founder and managing partner at Lexicon Management, a global long-short equity hedge fund for approximately four years. In the ten years prior to that he was a Senior Vice President and leader of the Small Cap Growth team at John Hancock Funds where he managed over \$2 billion in multi-cap, small cap and technology mutual funds. During this period he was often quoted in the popular financial press and appeared on CNBC and Bloomberg News. At the time of Manulife's purchase of John Hancock, he also served as the interim co-chief equity officer. Anurag was a utilities and transportation sector equity analyst at Loomis Sayles and spent four years in various roles in commercial banking at the Bank of Boston.

He earned a Masters in Management from the Sloan School at MIT in 1988. He earned a Bachelor's Degree in Commerce (Honors) from Delhi University and is a Chartered Finance Analyst.



Chris Paoella*

Managing Director, OCIO
Invesco

Chris Paoella is a Managing Director and Head of North America Institutional’s Outsourced Chief Investment Officer (OCIO) channel. He is a member of Invesco’s North America Institutional

Management team.

Prior to joining Invesco in 2018, Mr. Paoella spent 10 years as a managing partner of a partnership group that launched and operated a series of investment boutiques: Perimeter Capital, Concourse Capital and Liquid Strategies. Mr. Paoella also served as head of consultant relations for Trusco Capital. He began his career at Great-West Life and Annuity, where he focused on defined contribution retirement plans.

Mr. Paoella earned a BA degree in economics from the University of Richmond. He holds the Series 7 and 66 registrations.



Carolyn Patton, CFA*

AIMSE President Emeritus

Carolyn Patton, CFA has 26 years of experience in the investment management industry and is a frequent public speaker. She most recently was the Head of Distribution, Americas at First State Investments. First State Investments is a diverse

global asset management business headquartered in Australia with expertise in a range of asset classes including direct and listed infrastructure, Asia Pacific and emerging markets equities.

Previously, Carolyn was Managing Director, Head of East Coast Sales and Americas Head of Consultant Relations at Deutsche Asset Management. Previously, Ms. Patton was Executive Managing Director and Principal, leading the global distribution team at Turner Investments. For over six years, she lived in Denver, Colorado and was Global Head of Consultant Relations at Janus Capital Group representing all asset managers within the multi-boutique including Janus, INTECH, and Perkins. Before Janus, Carolyn was based in London, England and in West Conshohocken, PA. She was Managing Director at Morgan Stanley Investment Management Ltd. and Morgan Stanley Investment Management, respectively. She also worked at Delaware Investments, now known as Macquarie Group, and started her career at SEI Investments.

Carolyn received her B.A. in Economics from The University of Virginia and is a CFA Charterholder.



Matt Pawlak

Vice President
Dimensional Fund Advisors

Matt Pawlak, Vice President, has 15 years of experience in the investment industry. Matt is responsible for developing and executing strategic marketing and business plans for Dimensional

Fund Advisors (Dimensional). He works with institutional investment consultants through proactive engagement and promotes the firm’s investment philosophy, processes, and investment strategies.

Prior to joining Dimensional in January 2012, Matt worked for eight years at Hewitt EnnisKnupp (now Aon Investment Consulting, Inc.). As a senior consultant, he acted as lead and co-lead consultant for a number of corporate defined benefit/defined contribution, endowment/foundation, and public fund retirement plans. Before moving into a client advisory role, Matt was a member of Hewitt EnnisKnupp’s defined contribution research group.

Matt is a member of the Defined Contribution Institutional Investment Association (DCIIA) and is a member of its Retirement Income and Public Policy Committees. He is also DCIIA’s Texas Regional Ambassador. Matt is a board member of the Association of Investment Management Sales Executives (AIMSE) and is their Texas Regional Coordinator for events.

Matt holds a BA in economics from the University of Iowa and an MBA in finance from Loyola University Chicago. He is FINRA Series 7 and 66 licensed. Matt earned the AIF® designation in 2018. Attainment of the AIF® designation demonstrates understanding of the Prudent Practices® and methodology.



Karl Polen

Chief Investment Officer
Arizona State Retirement System

Karl Polen serves as Chief Investment Officer of the Arizona State Retirement System fulfilling a long-held ambition to spend the latter years of his career in public service. In this position, Karl

oversees the management of \$41 billion in stocks, bonds, real estate and other assets. Karl joined the ASRS in 2010 as head of private markets investing and was promoted to CIO in 2016. Karl first became connected with ASRS in 1994 when he began a 12 year tenure as a trustee of the ASRS. Prior to joining ASRS, Karl worked nearly 30 years in the real estate industry in diverse financial and operational roles including 15 years as CFO of Robson Communities, a developer of active adult communities, and 8 years as Executive Vice President of Pivotal Group, a diversified real estate investor and operator. In addition to board service with ASRS, Karl served on the boards of the Central Arizona Project, the Boys and Girls Clubs of Metropolitan Phoenix and on various Governor’s commissions pertaining to real estate and natural resource matters. Karl earned a Master of Business Administration degree from Vanderbilt

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES (CONTINUED)

University, a Bachelor of Music degree from the University of Illinois and pursued additional undergraduate studies in mathematics and computer science at the University of Tennessee.



Chris Rae

Founder & Managing Director
Elevation Marketing Advisory

Chris is Founder and Managing Director of Elevation Marketing Advisory, an outsourced marketing and client service business. Elevation Marketing Advisory, established in February

2016, is a business division of Elevation LLC, a Charlotte-based broker-dealer. In addition to its marketing advisory and execution businesses, Elevation LLC has an exclusive distribution arrangement with Variant Perception, a leading provider of cross-asset class, data-driven market commentary and research.

Elevation Marketing Advisory's first client is Sorin Capital Management, LLC, a Stamford, Connecticut-based management firm focused on CMBS and REITs. Sorin runs hedge fund and liquid alternative strategies within these markets. Sorin currently manages over \$760mm in AUM from institutional investors including pension funds, family offices, and fund of funds. Chris joined Sorin in 2014 as the Managing Director and Head of Business Development.

From 2008 to 2013, Chris was a Director of Marketing at S.A.C. Capital Advisors, L.P. focused on covering all investor types across the Americas. Prior to joining S.A.C., from 2006 to 2008 Chris was a Managing Director, Client Relations at Chilton Investment Company. From 2003 to 2006, Chris was a Vice President at Goldman, Sachs & Co. working within the Equities and Fixed Income Divisions as a member of the Pensions Services Group providing institutional sales coverage for pensions, endowments, and foundations. Prior to 2003, Chris was an Associate in Goldman's Investment Banking Division primarily covering natural resources and industrial companies.

Chris received both his AM and BA in Philosophy from Stanford University and his JD/MBA from Duke University.



Dina Richard

Chief Investment Officer
Trinity Health

Dina L. Richard is Senior Vice President, Treasury and Chief Investment Officer at Trinity Health, one of the largest multi-institutional Catholic health care delivery systems in the nation, serving more than

30 million people in 22 states. Dina is responsible for the company's Treasury and Investment functions, including overseeing \$20+ billion in assets managed. She joined Trinity Health in 2014, and has 25 years of financial and investment experience. Prior to joining Trinity Health, Ms. Richard was Chief Investment Officer for Taubman Ventures Management. She also spent 15 years with DTE Energy

in a variety of leadership positions within Finance and began her career with the Federal Reserve Bank in Detroit.

Ms. Richard earned her Bachelor's degree from the University of Michigan, and a Master of Business Administration from Wayne State University.

Ms. Richard serves on the Investment Advisory Committee for the State of Michigan Retirement System. She is Chair of the Investment Committee for the Detroit Institute of Arts, and also serves on the Pension & Investment Committee for Bon Secours Mercy Health.



Dennis Sabo, CFA

Partner, Portfolio Manager
Edge Capital Group

Dennis joined Edge in 2010 and is currently responsible for coordinating the firm's investment research efforts and serves as equity portfolio manager for the Blue Current Global Equity team. Given his background, Dennis has an instrumental role in advising the firm and its clients on global equity market trends and opportunities. He is currently a partner at the firm and holds several management positions. During his investment industry career, Dennis spent several years as a sell-side analyst with firms such as Suntrust Robinson Humphrey and Credit Suisse. He came to Edge in 2010 following his role as a buy-side equity analyst at an emerging hedge fund. Dennis is a Chartered Financial Analyst (CFA) and is a member of the Atlanta Society of Finance and Investment Professionals.



Mark-André Saucier-Nadeau

Portfolio Manager, Global Equities
Caisse de dépôt et placement du Québec

Mark-André Saucier-Nadeau is portfolio manager for the CDPQ Global Value fund. Previously, he was heading the consumer research team at CDPQ from 2012 to 2017, where he advised on public and private equity transactions in the global consumer sector. Prior to joining the fund, he was an equity research analyst at Goldman Sachs, which he joined in 2005. Mark-André holds an MSc from the London School of Economics, a Master from Sciences-Po Paris and a BCom from HEC Montréal.



Troy Searles, CFA

Co-Chief Investment Officer
Federated Management Services

Troy Searles started his institutional investment career with the Louisiana State Employees' Retirement System (LASERS) in 2001. Troy was promoted to the Deputy Chief Investment Officer position helping oversee the \$11B portfolio with over \$2B in

internally managed assets. Troy started and managed the systems first international enhanced index fund trading stocks in 25 countries denominated in 13 different currencies and spent time covering the fixed income and hedge fund portfolio.

In June of 2014, Troy accepted the position of Chief Investment Officer with the \$3.6B Parochial Employees' Retirement System of Louisiana. After joining PERSLA he developed an alternatives platform committing \$70M+ per year and re-shaped the traditional asset mix.

In late 2018 he joined a family office in Lafayette, LA as their Co-Chief Investment Officer overseeing all aspects of the investment portfolio.

Troy earned a Master's Degree in Finance from LSU in 2005, his CFA designation in 2007 and taught a CFA review course at Louisiana State University from 2009-2017.



Harshal Shah, CFA
Senior Vice President
Callan

Harshal Shah, CFA is a Senior Vice President within Callan's Private Equity Consulting Group. He joined Callan in 2017 and assists in all aspects of private equity consulting, including research

and client servicing, portfolio reviews, manager searches and research projects.

Prior to joining Callan, Harshal was a Portfolio Manager within the private equity group at CalPERS, underwriting fund commitments, co-investments and assisting with various special projects. Prior to CalPERS, he was a Vice President at Strategic Investment Solutions, assisting clients in the development and implementation of their private equity programs. Harshal also worked at Fremont Investments and Wells Capital Management as a portfolio manager and research analyst, responsible for the coverage of the Telecommunications, Healthcare and Energy Sectors.

Harshal earned a BA in Finance from California State University, Fullerton and he is a holder of the right to use the Chartered Financial Analyst® designation.



Colleen Smiley
Principal, Assistant Director of Public Markets
Manager Research
Meketa Investment Group

Ms. Smiley joined Meketa Investment Group in 2011. A Principal of the firm, Ms. Smiley manages the investment operations team, which includes

oversight of investment analytics, performance reporting, and administrative teams. Ms. Smiley was previously the Assistant Director of Public Markets Manager Research, and is a member of

the Marketable Securities Investment Committee and Chair of the firm's ESG Investing Committee.

Prior to joining the firm, Ms. Smiley worked at Brandes Investment Partners, L.P. in the institutional client portfolio management group, and in client service and operations at Standard Pacific Capital, a hedge fund based in San Francisco. Ms. Smiley earned an MBA from the University of San Diego with a concentration in Finance. She holds an undergraduate degree in Business Administration from California Polytechnic State University, San Luis Obispo.



Bonnie Stanfield, CFA*
Director, Consultant Relations
Putnam Investments

Ms. Stanfield is Director, Consultant Relations, in the Global Institutional Management group. She is

responsible for managing relationships with institutional investment consultants in the Midwest and West Coast regions of the United States. She also serves on the Auxiliary Board at the Art Institute of

Chicago. Ms. Stanfield joined Putnam in 2013 and has been in the investment industry since 2003.



Dimitrios Stathopoulos*
Senior Managing Director,
Head of Institutional Sales
Nuveen

Dimitri oversees Nuveen's institutional sales efforts in the U.S. Prior to rejoining the firm in 2017, Dimitri was a managing director at Neuberger Berman

on the institutional sales and consultant relations team. During his previous tenure with Nuveen, which started in 2007, Dimitri oversaw the global consultant relations effort. Prior to that, he was a partner at Harris Investment Management responsible for client service and sales, after having served in similar client service and sales positions with Brinson Partners and Charles Schwab earlier in his career.

Dimitri graduated with a B.B.A. as well as an M.B.A. in Finance from Loyola University Chicago.



Mark Steed
Chief Investment Officer
Arizona Public Safety Personnel Retirement System

Mark has senior responsibility for the public equity and credit opportunities portfolios and has more than 10 years of experience with private and public markets. Starting as an intern in 2007, Mark earned

an investment team position that included overseeing private equity and venture capital investments. He recently concluded a four-year project as a forecaster for the distinguished Good Judgment Project,

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led by prominent behavioral economist Phil Tetlock. Prior to joining PSPRS, Mark worked in banking for JP Morgan Chase. Mark lives in Gilbert with his wife and three children and is a member of the acclaimed musical group Cinematic Pop.



Don Stracke, CFA, CAIA
Senior Consultant
NEPC

Don began his investment career in 1985, and he joined NEPC in 2009. Working out of Redwood City, CA office, his consulting responsibilities include servicing large and mid-size public pension funds exclusively. Don is a member of the Large Cap Equity Advisory Group.

Prior to joining NEPC, Don was the Director of Marketing/Client Service at Shenkman Capital Management and Attalus Capital. At both firms he was responsible for the overall management and execution of sales, marketing, and client service and was a member of the executive committee. Prior to Attalus, Don spent seven years as the Director of Corporate Client Services for Dresdner RCM Global Investors. His previous work experience includes eight years at Bankers Trust, where he was an investment consultant working with some of the most sophisticated plan sponsors in the country in the areas of risk measurement and analysis, asset allocation, and manager search.

Don received his bachelor's degree from Farleigh Dickinson University and his M.B.A. from Rutgers University. In addition, he holds the Chartered Financial Analyst (CFA) designation and the Chartered Alternative Investment Analyst (CAIA) designation.



George Tarlas, CFA
Senior Managing Director
Asset Consulting Group

George co-manages ACG and oversees our Institutional business. As a Senior Managing Director, he helps to set the strategic direction of the firm. George is a member of ACG's Investment Committee, which is comprised of senior members of the organization and whose primary task is to ensure continuity and consistency in the investment recommendations to our clients. George works with a broad array of client relationships and brings value to our clients through his strategic advisory, portfolio modeling and evaluation, and ongoing education. Outside of the firm, George is a member of the City of Town & Country Public Works Commission and an Advisory Board member of the Burrigge Center for Finance at the Leeds School of Business at the University of Colorado. Prior to joining our firm in 1996, George was a Vice President for Gershman Investment Corp. in St. Louis. He brings a background in finance and real estate, and earned his finance degree from the University of Colorado. George is a holder of the

Chartered Financial Analyst designation and is a member of the CFA Society of St. Louis and the CFA Institute.



Amanda Tepper*
Chief Executive Officer
Chestnut Advisory Group

Amanda Tepper is the Founder and CEO of Chestnut Advisory Group, a firm that provides business development consulting to asset managers. Chestnut's services encompass strategy, content and implementation. Previously Amanda was Global Director of the senior portfolio management team at AllianceBernstein. Amanda has deep experience in sell-side equity research, as Associate Director of Equity Research at Bank of America and as an Institutional-Investor All-America Teamranked analyst at JPMorgan. Amanda holds an MBA from The Wharton School and a BA from Brown University, Phi Beta Kappa. Amanda is a member of the Investment Advisory Committee for the Endowment of the Art Students League of New York. She also serves as a member of the 100 Women in Finance Global Advisory Council, and on the Andover Development Board of Phillips Academy.



Kurt Terrien*
Managing Director, Institutional Sales
Clarkston Capital Partners

Kurt joined Clarkston Capital Partners in 2013 and oversees the firm's institutional business, including sales, consultant relations and client service. Kurt has over 20 years of industry experience. Most recently, he was the Director of Sales and Consultant Relations for Johnson Institutional Management. Prior to that, he was Vice President of Institutional Asset Management at National City Bank and a Senior Client Services Manager at World Asset Management. Kurt received a Bachelor's degree in Finance from Walsh College and a MBA from Wayne State University. He is a member of MAPERS (Michigan Association of Public Employees Retirement Systems) and serves on the board of AIMSE.



Eric Thielscher, CFA
Global Head of Public Investments
Cambridge Associates

Eric is the Global Head of the Public Investments Group and oversees the research and evaluation of new and established institutional quality managers across all equity asset classes. He also chairs the Public Equities Investment Committee and spearheads the firm's efforts to improve client-paid manager fees and terms. Additionally, Eric retains responsibility for the research of global ex-

US equity investment strategies.

Eric joined Cambridge Associates in 2007 and has more than 22 years of experience as an investor. Before joining Cambridge Associates, Eric spent 11 years at MFS Investment Management, most recently as an Assistant Vice President in the Institutional Product Management department where he was a member of the global and international team. During his tenure at MFS, he also held positions in Equity Trading, Private Client Portfolio Management, and Operations. Before MFS, he worked in London for Credit Suisse Financial Products and began his career at The Boston Company.

Eric is a CFA Charterholder and holds an MBA from the F.W. Olin Graduate School of Business at Babson College and a BA in Economics from Hobart College.



Ronald Thompson, CFA, CAIA

Vice President, Pension Investments & Chief Investment Officer
Alcoa Corporation

Ron Thompson joined Alcoa in March 2018 as Vice President of Pension Investments, responsible for managing approximately \$5 billion

in retirement plan assets.

Ron has over twenty years of experience, with approximately ten years of experience in pension management and ten years of experience in investment management. Before joining Alcoa, Ron managed the retirement plans at Rockwell Automation in Milwaukee for about four years and was the manager of global pension plans for five years at Dow Chemical/Dow Corning in Midland, Michigan. His investment management experience with Fifth Third Bank and Dow Chemical, both in Michigan, includes commercial credit, fixed income and equity analysis, equity portfolio management and managing a money market fund.

Ron graduated from Michigan State University with a BA in Accounting and earned an MBA in Finance from the University of Wisconsin.

He holds the CFA and CAIA designations.

His volunteer work includes serving on the investment committee of the Children's Hospital of Wisconsin and on the investment committees of Mid-Michigan Health Systems.



Ron Tite

Keynote Speaker

Trained at the legendary Second City, Ron Tite has always blurred the lines between art and commerce. He has been an award-winning advertising writer and Creative Director for some of the world's most respected brands including

Air France, Evian, Fidelity, Hershey, Johnson & Johnson, Kraft, Intel, Microsoft, Volvo and many others.

Currently, Ron is Founder and CEO of Church+State, an agency that helps global brands unify content and advertising, and Editor-in-Chief of The Business Casual.

Ron has written for television. Penned a children's book. Wrote, produced, and performed a hit play. Created a branded art gallery. And was Executive Producer and Host of the award-winning comedy show, Monkey Toast. In demand as a speaker on disruption, innovation, creativity and content marketing, Ron speaks to leading organizations all over the world about "Think. Do. Say", his own take on modern business. Ron's own book, Everyone's An Artist: Or At Least They Should Be (Co-written by Scott Kavanagh and Christopher Novais), was published by HarperCollins in 2016.



Tonja Truesdell*

Regional Director, Institutional Group
Thornburg Investment Management

Tonja Truesdell is regional director for Thornburg Investment Management. Her primary responsibilities include servicing Thornburg's institutional client base and business development

in the Southeast United States. Tonja joined Thornburg Investment Management in 2013.



Greg Ungerman, CFA

Senior Vice President,
Defined Contribution Practice Leader
Callan

Greg Ungerman, CFA, is a Senior Vice President and Defined Contribution Practice Leader. Greg is responsible for setting the direction of Callan's

DC business, providing DC support both internally to Callan's consultants and externally to Callan's clients, and working with Callan's team of DC subject matter experts to develop research and insights into DC trends for the benefit of clients and the industry.

Previously Greg was the co-manager of Callan's San Francisco Fund Sponsor consulting office. He worked with a variety of plan sponsor clients across the western region, including corporate defined benefit and defined contribution plans, foundations/ endowments, multi-employer and public plans. His client service responsibilities included strategic planning, plan implementation, coordination of special client requests and customized performance reporting. Greg is a member of Callan's Management and Defined Contribution committees and is a shareholder of the firm.

Greg joined Callan in October of 1998. Before joining the Plan Sponsor consulting group in early 2001, Greg was Senior Analyst in the Client Report Services group. In that role, Greg specialized in all aspects of performance measurement and analytics and was responsible for managing some of Callan's largest reporting relationships. Prior to joining Callan, he worked at IMG, organizing

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professional golf and tennis tournaments.

Greg graduated in 1998 from UC Davis with a BS degree in Managerial Economics. Greg is a holder of the right to use the Chartered Financial Analyst® designation. He belongs to the CFA Society of San Francisco and CFA Institute.



Kristin Varela

Deputy Chief Investment Officer
Public Employees Retirement Association
of New Mexico

Kristin Varela is the Deputy Chief Investment Officer for the Public Employees Retirement Association of New Mexico, where she assists the Chief Investment Officer in the design and implementation of the fund's overall strategic goals, investment policies and programs. Kristin has also served as the Real Assets Portfolio Manager, since 2015. She oversees and administers a targeted \$3.1 billion multi-asset and multi-strategy portfolio of investments, across liquid and illiquid investment strategies, which include a broad range of asset types such as Real Estate Investment Trusts, Master Limited Partnerships, Inflation Linked Bonds, Real Estate, Energy, Timberland, Agriculture and Infrastructure.



Mariela Vargova, Ph.D.

Senior Vice President and Senior Sustainability
& Impact Analyst
Rockefeller Capital Management

Mariela M. Vargova, Ph.D., is Senior Vice President with the ESG Investing Team at Rockefeller Capital Management. She focuses on the integration of environmental, social and governance factors in the investment process, and is responsible for corporate engagement strategies and external industry collaborations. Ms. Vargova is Chair of Rockefeller's Responsible Investing Committee, which supports the firm's responsible investing activities in asset management. Prior to joining Rockefeller in 2005, Ms. Vargova had an extensive academic experience in the social sciences. Currently, Ms. Vargova sits on the International Integrated Reporting Council (IIRC), on the Principles for Responsible Investment's (PRI) Investor Engagements Advisory Committee, and on the Council of Institutional Investors (CII) Corporate Governance Advisory Council. Ms. Vargova holds an M.A. in Political Science from Sofia University, Bulgaria, and an M.A and a Ph.D in Political Science from the New School for Social Research, New School University, New York.



James Wesner, CFA

Managing Partner
Marquette Associates

James R. Wesner is a managing director for Marquette Associates and serves on the firm's board of directors. An owner of the firm, Jamie has been with the company since 2007 and

has 19 years of investment experience. He serves as the primary investment consultant on several client relationships. Jamie serves on the firm's discretionary committee, endowment & foundation services committee, healthcare committee, and the alternative investment manager search committee.

Prior to joining Marquette, Jamie worked in the debt capital markets division at Banc of America Securities. Prior to Banc of America, he held positions with Nuveen Investments and PricewaterhouseCoopers.

Jamie holds a B.B.A. in finance from the University of Notre Dame and an M.B.A. with distinction in finance and international business from Northwestern University's Kellogg School of Management. Jamie is a CFA charterholder, a member of the CFA Society of Chicago and a board member for the One Acre Fund.



Trevor Williams, CFA, CAIA

Managing Director, Portfolio Manager
Penn Mutual Asset Management

Mr. Williams serves as managing director & portfolio manager of Penn Mutual Asset Management. Trevor is responsible for the management of the alternative assets portfolio.

Prior to joining Penn Mutual, Trevor worked for Janney Montgomery Scott, LLC as a manager of the investment analyst team. In this capacity, Trevor managed a group of analysts responsible for sourcing, recommending and performing on-going due diligence on open-end mutual funds, separately managed accounts, exchange traded funds, closed end funds and private funds for the firm's financial advisors.

Trevor also worked at Hamilton Lane as a senior associate where he identified, assessed and issued recommendations on private equity, venture capital and real estate funds for the private equity gatekeeper, screening approximately 150 funds during his tenure.

Trevor earned a Bachelor of Business Administration degree in Accounting from Siena College and a Master of Business Administration degree from Villanova University. He attained the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations in 2001 and 2010, respectively.



Gary Wyniemko, CFA

Principal, Senior Consultant
NEPC

Gary Wyniemko joined NEPC in 2011 and brings over 15 years of investment expertise to the firm's Philanthropic Practice Group servicing a broad group of clients in the endowments and

foundations, and healthcare areas.

Prior to joining NEPC, Gary was a Senior Treasury Analyst at Henry Ford Health System (HFHS) in Detroit, MI. While at HFHS, Gary was responsible for asset allocation, manager selection and due diligence, performance reporting, investment research, and various aspects of financial reporting. Prior to his employment at Henry Ford Health System, Gary worked as a Corporate Treasury Analyst at Dura Automotive Systems, Inc., and as a Treasury Analyst at H&R Block Financial Advisors.

As a Principal, Gary works with clients on overall fund design, including asset allocation, manager selection, performance reporting and monitoring, and education. Gary is particularly known for his expertise in working with highly complex healthcare clients.

Gary earned a B.B.A. in Finance with Distinction and a M.B.A. with High Distinction from the University of Michigan-Dearborn. Gary also holds the Chartered Financial Analyst designation.



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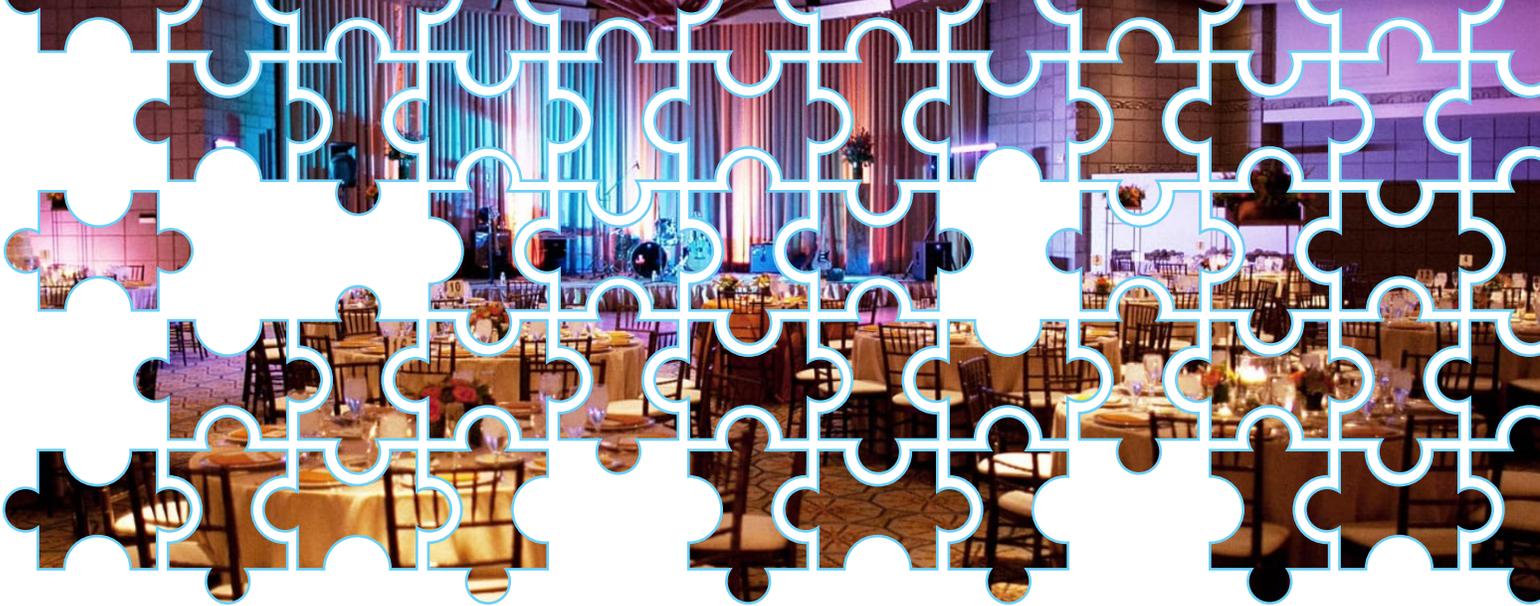
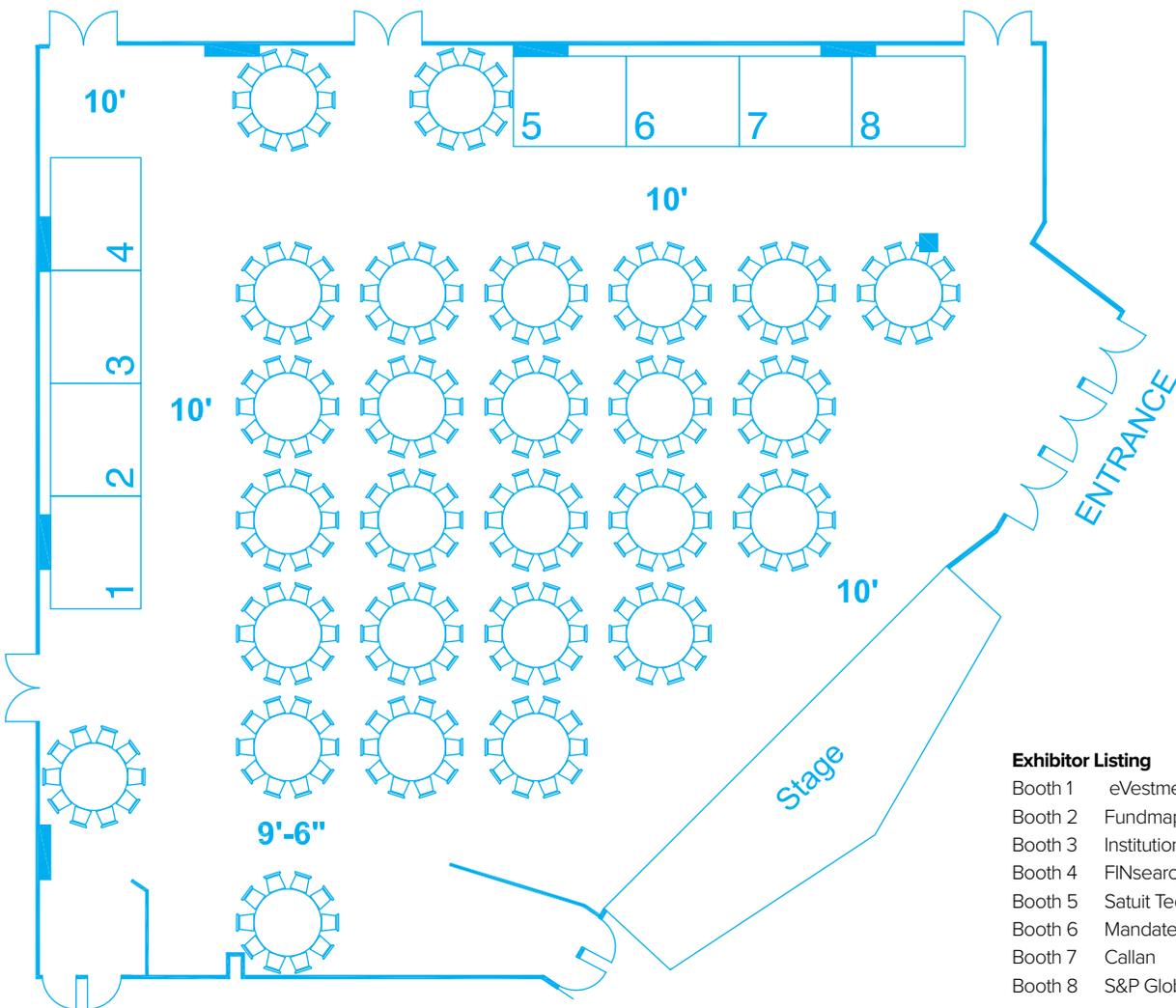


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Exhibitor Listing

- Booth 1 eVestment
- Booth 2 Fundmap
- Booth 3 Institutional Investor
- Booth 4 FINsearches
- Booth 5 Satuit Technologies
- Booth 6 MandateWire
- Booth 7 Callan
- Booth 8 S&P Global Market Intelligence

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Institutional Investor

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S&P Global Market Intelligence integrates financial and industry data, research, and news into tools that help track performance, generate alpha, identify investment ideas, understand competitive and industry dynamics, perform valuation, and assess risk.



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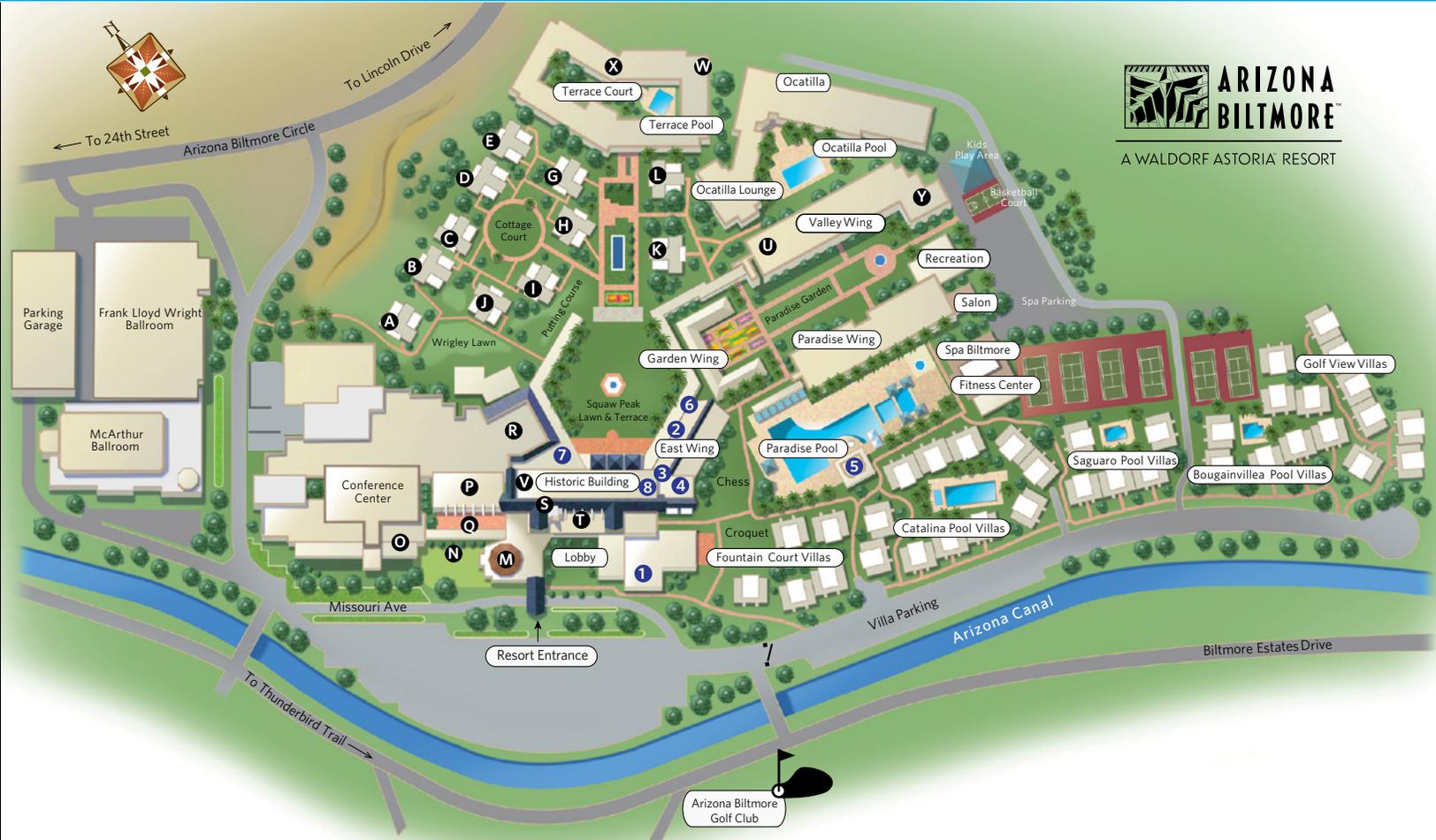
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- 4 Wright's at the Biltmore
- 5 Cabana Club
- 6 Terrace Shops
- 7 Gift Shop
- 8 Wright's Studio

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| Coconino | Casa Grande |
| Grand | Kaibab |
| Mesa | Canyon |
| Prescott | Flagstaff |
| Sedona | Kingman |
| Rimrock | Papago |

COTTAGE ROOM NUMBERS

- A 5100-5103
- B 5104-5107
- C 5108-5111
- D 5210-5211 (UPSTAIRS)
- E 5116-5119
- G 5120-5123
- H 5124-5127
- I 5128-5131
- J 5132-5135
- K 5136-5140

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- M Aztec
- N Aztec Lawn
- O FedEx Business Center
- P Gold Room
- Q Gold Room Patio
- R Grand Ballroom
- S History Room - 3rd Floor
- T History Room Deck - 3rd Floor
- U Hohokam - 4th Floor
- V Mystery Room - 2nd Floor
- W Taliesin
- X Terrace
- Y Valley Room

OCATILLA

6102-6347

FOUNTAIN COURT VILLAS

7100-7113

7200-7213

CATALINA POOL VILLAS

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7214-7233

SAGUARO POOL VILLAS

7134-7143

7234-7243

BOUGAINVILLEA POOL VILLAS

7144-7161

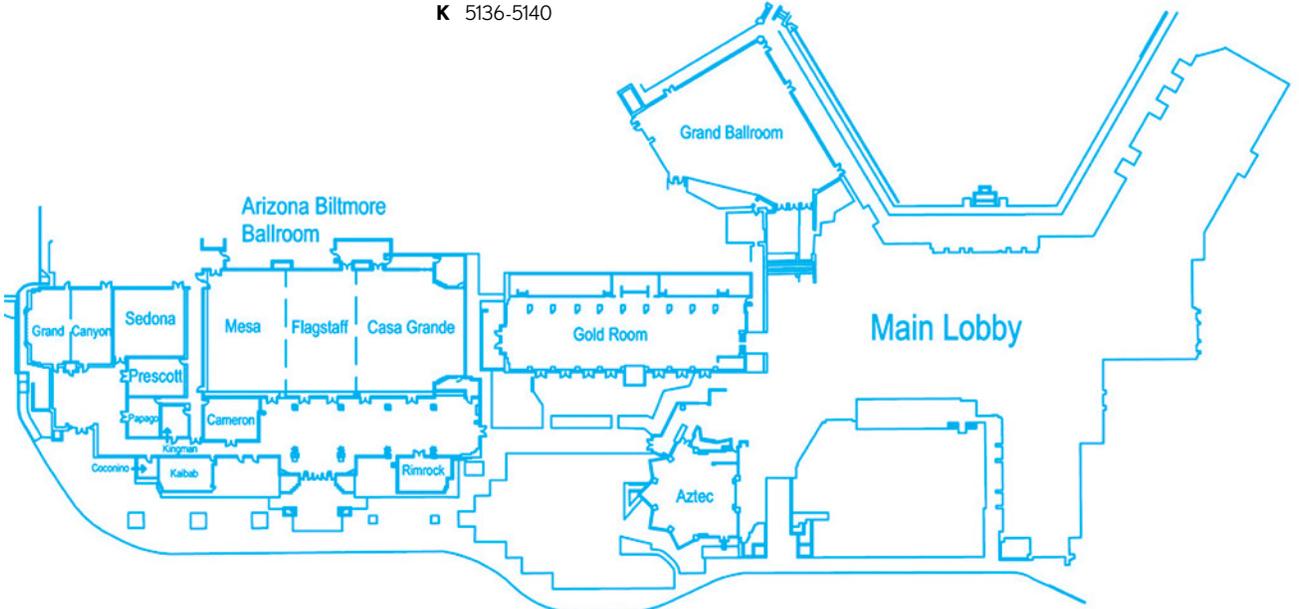
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The Westin New York at Times Square
New York, New York



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27TH ANNUAL CANADIAN CONFERENCE

January 15-16, 2020
Intercontinental Toronto Centre
Toronto, Ontario



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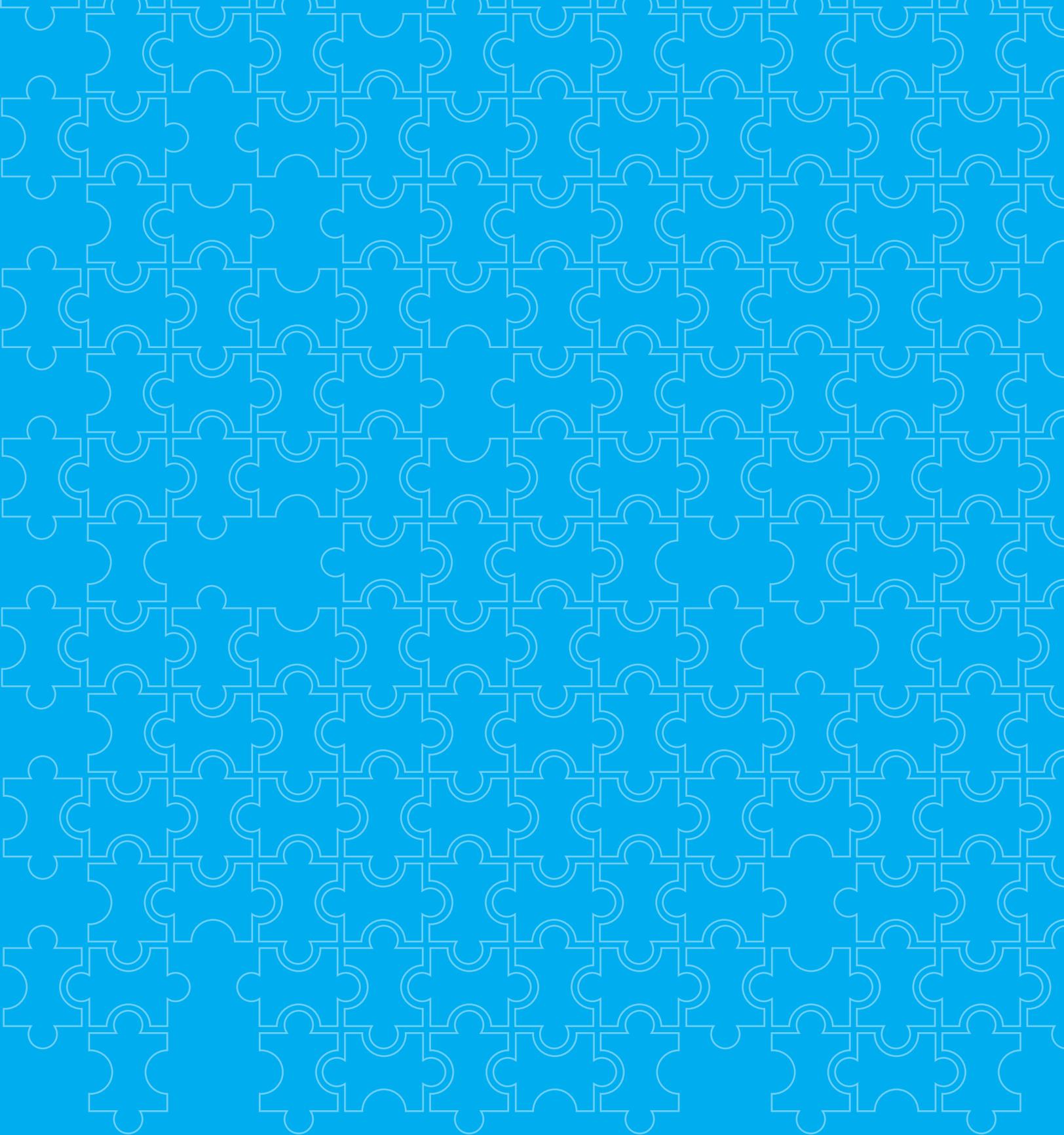
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