

AIMSE 2021 ANNUAL CONFERENCE

HINDSIGHT IS 2020

PERSEVERE & PROSPER

A Virtual Event • May 18–21, 2021

PROGRAM



AIMSE

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Dear valued AIMSE members,



We are thrilled that you have chosen to be a part of the 44th Annual Marketing & Sales Conference, AIMSE's marquee event that fosters community and provides a forum for the sharing of leading-edge industry knowledge.

After more than a year of working from home, we were hoping we would be back together in-person for this event. Unfortunately, ongoing COVID-19 restrictions have made that impossible. Our primary goal with this event is to provide an engaging experience. We have organized a compelling program which will be broadcast live, with an opportunity to ask questions of the panelists. We will also be offering small group networking sessions where you will be able to connect live with speakers, consultants and fellow AIMSE members.

We have chosen "Hindsight is 2020: Persevere & Prosper" as the theme for this year's conference. In keeping with the AIMSE motto of "Engage, Grow & Succeed," we have curated a program designed to keep you connected, provide professional development, and position you to thrive in the coming post-vaccine world. We are all looking forward to resuming business travel and a more normal routine, but, as we all know, the landscape has shifted underfoot during the pandemic. Accordingly, our agenda is tailored to ensure you are informed of these changes and prepared to succeed in this new selling environment.

Highlights include:

- An insightful State of the Industry discussion featuring Rich Nuzum of Mercer and Millie Viqueira of Callan.
- Renowned Diversity, Equity and Inclusion expert Risha Grant will deliver a dynamic keynote presentation that will be immediately followed by a moderated session regarding DE&I implementation featuring distinguished leaders in our industry.
- "The View from Washington" will offer a timely political and economic update from industry insiders James Lucier and Harvey Rosenblum.

- Prominent CIOs and allocators sharing their thoughts on asset allocation and lessons learned during the pandemic.
- A thoughtful examination of how investment distribution roles have been impacted by the pandemic and what skills will be essential in the future.
- Wait But Why blog creator and acclaimed TED Talk speaker Tim Urban will provide a refreshing professional development session focused on improving communication skills.
- In-depth asset class discussions featuring a broad spectrum of consultants. These panelists will provide crucial perspectives on how they are structuring portfolios and selecting managers.

This inspiring agenda would not have come together without significant contributions from many people. First, we want to express our sincere appreciation to our speakers who are donating their time and insights. AIMSE's partnership with these consultants, plan sponsors and industry experts is central to our mission and the lifeblood of our conferences. We also want to say a special thank you to our sponsors who are instrumental in making these events possible and bring welcome knowledge and support to our proceedings. Lastly, we must offer our deep gratitude to the Annual Conference Planning Committee and our partners at Virtual, Inc. This event would not have been possible without their tireless efforts over the past six months.

We hope you enjoy the conference!

Sean Clark, CFA

Westwood Management
Conference Co-Chair

Christa Maxwell, CFA

Acuitas Investments, LLC
Conference Co-Chair

2020 – 2021 OFFICERS**Kurt P. Terrien**

President, AIMSE
Clarkston Capital Partners

Adam Gerentine

Treasurer
Trinity Street Asset Management

Miriam Tai, CFA, CAIA

Vice President, AIMSE
Franklin Templeton Investments

Michael R. Gillis

President Emeritus
TD Asset Management

Gregory T. Bauer, CFA, CAIA

Parametric Portfolio Associates

John P. Mirante, CFA, CPA

BMO Global Asset Management

Tony Buscemi

Gallatin Capital

Matt Pawlak

Dimensional Fund Advisors

Gus Catsavis, CFA

Pinnacle Asset Management, L.P.

Kerra Smith

Lawton Park Capital Management, LP

Sean Clark, CFA

Westwood Management

Mark A. Sullivan

Elevation Marketing Advisory

Lewis Del Ponte

Harvest Volatility Management, LLC

James Stafford, CFA

Atlanta Capital

Ami Fox

Artisan Partners, Limited Partnership

Derek Tubbs

CornerCap Investment Counsel

Maureen Hays

Principal Global Investors

Kimberley Woolverton, CFA

Foyston, Gordon & Payne, Inc.

Tasleem Jamal, CFA

Sprucegrove Investment Management Ltd.

Keith Wosneski

Mackenzie Investments

Christa Maxwell, CFA, CIPM

Acuitas Investments, LLC

Peter Crivelli

Carillon Tower Advisers

2021 Annual Conference Committee Chairs**Sean Clark, Co-Chair**

Westwood Management

Christa Maxwell, CFA, CIPM, Co-Chair

Acuitas Investments, LLC

Speaker, Moderator & Conference Committee Biographies

**Indicates Annual Conference Committee Member*



Joel Baker, CFA

Senior Investment Consultant

Highland Consulting Associates, Inc.

Joel has over 20 years of relevant investment and consulting experience. He began his consulting career with IBM and was with Ernst & Young as a senior consultant prior to joining Highland. During his tenure at Highland, Joel has served as Highland's research team leader and as Highland's non-profit team leader. While his time today is focused on Highland's E&F and ERISA client base, Joel continues to work closely with Highland's research team and has covered fixed income, equities (public and private) and other alternative strategies.



Will Beck

Senior Vice President

Wilshire

Will Beck is a senior vice president of Wilshire and leads the fixed income group within Wilshire's Manager Research team. Mr. Beck has more than 10 years of industry experience and his in-depth research coverage include multiple publicly traded asset classes. Prior to joining Wilshire 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.



Keith M. Berlin

Senior Vice President, Director of Global Fixed Income and Credit

FEG Investment Advisors

Investment Professional since 1996, FEG team member since 2000

Education:

- MBA, Thomas More College
- BA in Economics, University of Kentucky

Career Highlights

- Named one of the 20 Rising Stars of Fixed Income 2008 by Institutional Investor News

Experience

- Fifth Third Bank – Money Markets Trader
- Schaeffer Investment Research – Research Analyst

Speaker, Moderator & Conference Committee Biographies



Sean Clark, CFA*

*Senior Vice President, Institutional Sales & Consultant Relations
Westwood Management*

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

Prior to joining Westwood, Mr. Clark spent over seven years as Senior Vice President, Consultant Relations with OFI Global Asset Management, an OppenheimerFunds company. His experience also includes roles as Managing Director, 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 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 and the CFA Society of Chicago. Mr. Clark is a current board member with the Association of Investment Management Sales Executives (AIMSE) and has served as a board member with Snow City Arts in Chicago and as a volunteer and fundraiser with Children's Miracle Network Hospitals.



Brendan Cooper

*Senior Consultant
Investment Metrics*

Brendan is a senior consultant at Investment Metrics, responsible for overseeing the research team. Brendan consults with the money management community on the investing of institutional assets. Living abroad for many years greatly influenced his interest in world affairs and was part of the reason that he studied history and economics. Brendan holds a BA from Boston College and has over 20 years of investment experience.



Peter Crivelli*

*Senior Vice President, Institutional Sales & Consultant Relations
Carillon Tower Advisers*

Peter Crivelli is responsible for Institutional Sales and Consultant Relations for Carillon Tower Advisers, the institutional investment business of Raymond James. Prior to joining Carillon Tower in 2014, Peter spent twelve years as a principal for the investment firm of Marvin & Palmer Associates and also worked for a start-up investment firm for a year. He has more than 25 years of experience in the investment industry. Peter received a Bachelor of Arts degree in Economics from Wesleyan University and an MBA from New York University Stern School of Business. Peter has served as an adjunct professor at the University of Delaware. He currently serves as a board member for the Serviam Girls Academy, a middle school for girls from low-income families. He volunteers as a youth lacrosse coach and as a speaker with American Legion Boys State.

John Dashtara*

Speaker, Moderator & Conference Committee Biographies



Lewis DelPonte*

Executive Director

Harvest Volatility Management LLC

Lewis is Executive Director at Harvest Volatility Management. Prior to Harvest, he was Vice President of Institutional Sales at Ranger Capital where he found success for the firm with Endowments and Foundations, Consultant Driven searches, sub-advisory, and regional broker/dealers. Lewis attended The Ohio State University where he majored in both business management and competing on the varsity wrestling team. Lewis is involved in the community through being an assistant coach of his sons wrestling club, charitable organizations like Denver Active 20/30 and educational groups like AIMSE. Lewis is an avid hiker and SPARTAN race participant.



Eric Edmond, CFA*

Director of U.S. Institutional Client Management

Eric Edmond is Director of U.S. Institutional Client Management at Mawer Investment Management, Ltd., which he joined in 2020. Based in Colorado, he co-leads the firm's consultant relations, business development, and institutional client management efforts in the United States.

Prior to joining Mawer, Mr. Edmond was with Thornburg Investment Management, Inc. for 11 years, focused on all aspects of institutional distribution—consultant relations, business development, and client management. Previously, he was with T. Rowe Price, providing investment and financial guidance to individual investors.

Mr. Edmond holds a Bachelor of Science in Business - Finance from the University of Phoenix and is a CFA charterholder with investment experience since 2007. He is a member of the CFA Institute, CFA Society Colorado, and CFA Society New Mexico. He is also a veteran of the U.S.



Josh Emanuel, CFA

*Chief Investment Officer, Investment Management
Wilshire*

Josh Emanuel, Chief Investment Officer of Investment Management, joined Wilshire in 2015 and has 20 years of industry experience. In his role as CIO, Mr. Emanuel leads the investment activities of Wilshire, including investment strategy, manager research, portfolio management, and quantitative alpha research. Mr. Emanuel also chairs the Wilshire Investment Committee. From 2010 to May 2015, Mr. Emanuel served as Chief Investment Officer of The Elements Financial Group, LLC (TEG), where he developed and managed a variety of outcome-oriented investment strategies and exchange trade funds. Mr. Emanuel also co-developed an innovative technology solution which provides volatility-based risk profiling, risk budgeting, and compliance services to financial advisors and institutions. Prior to his tenure at TEG, Mr. Emanuel served in several roles at Wilshire from 2004-2010, including head of manager research, head of strategy for Wilshire Funds Management, and co-chairman of the Wilshire Funds Management Investment Committee. Prior to 2004, Mr. Emanuel was responsible for international manager research for Jeffrey Slocum & Associates, Inc.

Mr. Emanuel has a BA in Finance from the University of Pittsburgh and holds the Chartered Financial Analyst designation.

Speaker, Moderator & Conference Committee Biographies



Lisa Erickson, CFA

*SVP, Co-Head of Public Markets Due Diligence
U.S. Bank Wealth Management*

As Co-Head of Public Markets Due Diligence, Lisa is responsible for directing all public markets investment research and fund manager selection for U.S. Bank Wealth Management. This work includes money manager due diligence, investment strategy review, asset class idea generation, process enhancement, and portfolio inclusion for equity, fixed income, real asset, and balanced strategies. Lisa also is a member of the Investment Strategy Committee, which drives the firm's asset allocation and portfolio construction policy for clients. Lisa is a frequent spokesperson for Wealth Management and appears on CNBC, Reuters, Bloomberg TV, Yahoo Finance and Fox Business, as well as print media such as the Wall Street Journal. Lisa has more than 30 years of experience in the financial services industry. Prior to joining U.S. Bank, she led research teams at Russell Investments and Altura Capital. She also served in numerous other roles, including capital markets analysis, investment infrastructure creation, product development and management, and institutional client service. Lisa is a member of the CFA Society of Minnesota and the CFA Institute. She has a passion for her community and serves on the boards of the Minnesota Women's Economic Roundtable and EPPIC Ministries.



Alexander Farquhar, CFA

*Managing Director, Senior Consultant
Ellwood*

Alex Farquhar is a managing director at Ellwood and joined our firm in 2000. As managing director of manager research, Alex is a member of the firm's management committee and oversees the firm's investment manager research process. Alex serves as the primary consultant to several Ellwood clients with a focus on corporate retirement plans, endowments, foundations, healthcare institutions, and family offices. Additionally, he is a member of Ellwood's OCIO committee. He holds the Chartered Financial Analyst designation and is a member of the CFA Institute and the CFA Society of Chicago. Alex received his Bachelor of Science in finance from University of Arizona in Tucson, Arizona.



Kristin Fenik, CFA*

*Director, Institutional Client Group
Vontobel*

Kristin Fenik joined Vontobel Asset Management in February 2021 as a relationship manager working with corporate and public pension plans, unions, endowments, foundations and sub advisory clients to help create investment solutions. She is responsible for developing and servicing institutional clients in the West Coast region of the U.S. Prior to joining Vontobel, Kristin Fenik was a Senior Vice President at Cambiar Investors, where she was responsible for business development and servicing institutional clients, as well as high net worth and Registered Investment Advisers (RIA) from 2019 to 2021. Prior to that, Kristin held senior-level positions in client and consultant relations at ArrowMark Partners (2014-2019) and OppenheimerFunds, Inc. (2005-2014). Kristin began her financial career in 2004 as a marketing associate at Putnam Investments. Kristin Fenik holds a Master of Business Administration from Duke University's Fuqua School of Business, as well as a Bachelor of Science in Business Administration from Fordham University's Gabelli School of Business. In addition, she is a Chartered Financial Analyst®

Speaker, Moderator & Conference Committee Biographies

Jeff Gabrione, CFA

Director, Investments (Head of US Manager Research)
Buck

Kirloes Gerges

Aon

Risha Grant

Founder & CEO
Risha Grant LLC

Motivated by her passion to correct societal isms like racism, sexism, classism and plain old stupidity, it is Risha's personal mission to expose the value of Diversity & Inclusion while shining a light on the economic impact it creates. From her race, gender and lifestyle choices, to growing a small business and tackling economic issues, every area of her life intersects diversity. Founder & CEO of Risha Grant LLC, an award-winning diversity consulting and communications firm, as well as an edgy, educational and motivational speaker, author Risha Grant is an internationally renowned diversity, inclusion and bias expert. She covers these topics as NBC KJRH's community correspondent and host of the Risha Talks series. Through her Tulsa World column, Risha Talks and as a contributor to Black Enterprise Magazine, she has motivated and educated numerous corporations, associations, and universities. In her book, *That's BS! How Bias Synapse Disrupts Inclusive Cultures and the Power to Attract Diverse Markets* and her corresponding "BS" Video Series, Risha has led audiences to new places of respect and understanding. These audiences have included Discover Card Financial Services, Samsung Electronics America, Cox Communications, Wells Fargo, USAA Diversified Financial Group, Boy Scouts of America, U.S. Airforce, Federal Reserve Bank of Kansas City, NBA's Oklahoma City Thunder, University of Oklahoma and Roger Williams University, to name a few. She has been featured in Forbes, The Financial Times, Off Script, Bloomberg Media, Black Enterprise, Engage Magazine, Radioactive Radio, Take the Lead Radio, The Dream Catcher podcast, Money for Life podcast, DJC Oregon Newspaper, The Kansas City Star, WUSA-TV, KVUE-TV, KTLU-TV, WURD Radio, among other local and national media. Risha has also been awarded numerous honors such as being named a 2019 Top 100 HR Influencer by Engagedly, a 2018 Inclusive Leadership Award Winner and Entrepreneur of the Year in 2017. Through her interactive keynotes and deep-dive training sessions, Risha teaches and empowers attendees with D&I tools to increase their bottom line and permission to get rid of their BS.

Samantha Grant, CFA, CAIA

Consultant
Marquette Associates

Samantha T. Grant is a consultant for Marquette Associates and has 13 years of investment experience. She joined Marquette in 2017 and serves as the investment consultant on several client relationships. Previously, she was a senior research analyst responsible for reviewing and conducting due diligence on U.S. equity products and managers, as well as developing



Speaker, Moderator & Conference Committee Biographies



macroeconomic and capital markets research. She is a member of the firm's investment committee, traditional investment manager search committee and the sustainable investing committee.

Prior to joining Marquette, Samantha was an investment research analyst at Mesirow Financial where she developed their defined contribution consulting group's manager due diligence program. Samantha started her career at Northern Trust in a leadership development program before moving into an equity portfolio manager role within their active equity department.

Samantha holds a B.S. in business administration and an M.B.A. in finance from Florida A&M University. She is a CFA charterholder, a member of the CFA Institute, and the CFA Society of Chicago. Samantha also holds the Chartered Alternative Investment Analyst designation and is a member of the CAIA Association®. Additionally, she is a member of Women's Investment Professionals, Chicago. Samantha also serves as a board member for the Southside YMCA.

Greg Graziano*

*Director, Consultant Relations
Lazard Asset Management LLC*

Greg Graziano is a Director on the Global Consultant Relations Team. He began working in the investment field in 1999. Prior to joining Lazard in 2018, Greg was a Director of Consultant Relations at Epoch Investment Partners. Before that, he was a Principal and Director of Consultant Relations & Client Service at Rainier Investment Management. Greg started his career at Deutsche Bank as a Key Accounts Manager and also spent time at US Trust in helping to build their DCIO business. Greg earned a BA in Political Science from Rutgers University.

Damian Handzy

*Head of Research & Applied Analytics
Investment Metrics*

Damian has 20 years' experience growing FinTech Analytics businesses. He co-founded and was CEO of Investor Analytics, Wall Street's first cloud-based multi-tenant risk analytics firm, which he sold to StatPro in 2016. Damian received his undergraduate degree from the University of Pennsylvania and his doctorate in nuclear astrophysics while working on Correlation Functions at the National Superconducting Cyclotron Laboratory at MSU.

Jessica Hart

*Senior Vice President, OCIO Retirement Practice Lead, Multi Manager Solutions
Northern Trust Asset Management*

Jessica leads Northern Trust's Outsourced CIO Retirement Assets Practice advising corporate, public and multi-employer plans. Jessica and her team serve as an extension of an institutional investor's staff, responsible for design, implementation, monitoring and evaluation of the client's entire investment program. She serves on the Investment Oversight Committee and Investment Policy Committee. Jessica is also actively involved in diversity initiatives in the Multi Manager Solutions business and has been engaged in building out a manager diversity due diligence framework. Jessica was previously responsible for the manager investment due diligence and portfolio management functions within the Multi-Manager Investments Practice.

Speaker, Moderator & Conference Committee Biographies



Sally Haskins

*Senior Vice President & Co-Manager, Real Assets Consulting Group
Callan*

Sally Haskins is a senior vice president and co-manager of Callan's Real Assets Consulting group. She has overall responsibility for real assets consulting services, and oversees research and implementation of real estate, timber, infrastructure, and agricultural asset classes. She also oversees all investment due diligence for real assets. She is responsible for strategic planning, implementation, and performance oversight of plan sponsor clients' real assets portfolios. Sally is a member of Callan's Alternatives Review and Management committees, and is a shareholder of the firm. She is also a member of the Pension Real Estate Association Board of Directors.

Sally joined Callan in 2010 from ING Clarion Partners where she was a director in the marketing and client service group. Prior to ING Clarion, Sally enjoyed a 15-year career with Russell Investments and Institutional Property Consultants, Inc. (IPC). While at Russell and IPC, Sally held multiple positions including real estate consulting, real estate manager research, and portfolio management. At Russell, she was head of property for Asia Pacific in Sydney, where she launched a global real estate opportunity fund of funds for Australian superannuation plans, conducted manager research on Asian real estate strategies, and was the portfolio manager for the Russell Australian Property Fund, which invested in listed property trusts. Sally started her real estate career in 1989 at the State Teachers Retirement System of Ohio as an acquisitions analyst.

Sally received an MS in real estate appraisal and investment from the University of Wisconsin-Madison and a BA (magna cum laude and Phi Beta Kappa) from St. Olaf College.



Jeremy J. Heer, CFA, CAIA

*Senior Portfolio Manager, Strategy
University of Chicago*

Jeremy is the senior portfolio manager for the strategy group at the University of Chicago. In this role, he supports the managing director of strategy in developing and managing the overall investment strategy for the endowment. Jeremy also helps manage the global macro portion of the University's hedge fund portfolio. He has previously served as the senior portfolio manager for the University's investments in private equity limited partnerships.

Prior to joining the University in 2010, Jeremy was a partner at Singer Partners, where he designed and implemented global macro and asset allocation strategies. Previously, he was an asset allocation analyst at UBS Global Investment Management (2004-2009) and Morgan Stanley Investment Management (2003-2004). Jeremy also has worked in risk management and derivatives-related roles for Morgan Stanley and Cargill Investor Services.

Jeremy earned an MBA with concentrations in finance and statistics from the Stern School of Business at New York University and a BS in finance from the University of Illinois at Urbana-Champaign. He is a CFA Charterholder, a grader of the exam, and a contributor to the curriculum. He also volunteers for the CFA Society of Chicago and currently serves as a member of the Board of Directors. Jeremy is also a CAIA Charterholder and serves on CAIA's Allocator Advisory Board.

Speaker, Moderator & Conference Committee Biographies



Steven Herbert, CFA

Chief Investment Officer

Kentucky Retirement System

Steven Herbert leads the Office of Investments and acts as the Chief Investment Officer.

He began his career in institutional investment management in 1997 at Watson Wyatt Investment Consulting, where he consulted with institutional clients in the Southeastern United States and in South America. Following that, he spent seven years with Mercer, where he was the lead consultant for a number of the firm's larger retirement fund clients in the U.S. and in Europe. Mr. Herbert later led Mercer's development of its proprietary investment manager research product, the Global Investment Manager Database (GIMD).

Most recently Mr. Herbert served for nearly three years as Chief Operating Officer of Jacksonville, Florida-based Augustine Asset Management. Prior to that he spent nine-and-a-half years as Director of Institutional Marketing at McKinley Capital Management, where he was responsible for sales, consultant relations, and client service.

Mr. Herbert received his Bachelor of Business Administration with a Decision Sciences concentration and his Master of Business Administration from Georgia State University. He is also a Chartered Financial Analyst® (CFA) Institute charterholder.



Eric T. Huff, CFA, CAIA

Vice President, Senior Consultant

LCG Associates, Inc.

Mr. Huff joined LCG in 2006 and is Vice President, Senior Consultant. 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 leads 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.



David Hyman

Partner & Senior Consultant

Mercer

David Hyman is a Partner and senior consultant in Mercer's Investments business. He develops client relationships, and drives the development and growth of client investment portfolios and platforms across various financial intermediaries, including registered investment advisory firms and

Speaker, Moderator & Conference Committee Biographies



regional banks David is a voting member of Mercer' Wealth Management Investment Committee, internal Wealth Management Strategic Research Team, and 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 and serves as a Trustee of The Conservative Synagogue of Westport (CT).

Kirsty Jenkinson

*Head of Sustainable Investment & Stewardship Strategies
California State Teacher's Retirement System*

Kirsty is the Investment Director, Sustainable Investment & Stewardship Strategies for the California State Teachers' Retirement System (CalSTRS), the largest educator-only public pension fund in the world with over \$290 billion of assets under management. She joined CalSTRS in January 2019 and is responsible for managing over \$9 billion in sustainability-focused investment strategies, overseeing the fund's stewardship activities including corporate engagement and proxy voting, and outreach with the fund's stakeholders.

Prior to joining CalSTRS, Kirsty spent four years at Wespath Benefits and Investments in Chicago and four years as the director of the Markets and Enterprise Program at the World Resources Institute (WRI), a Washington, D.C.-based global research organization focused on the environment and economic development. Before moving to the U.S., Kirsty was a Director of Governance and Sustainable Investment at F&C Asset Management (now BMO Global Asset Management) and an Executive Director in the Fixed Income division of Goldman Sachs in London.

Kirsty sits on the board of the Business and Human Rights Resource Centre and is a member of the Sustainability Accounting Standards Board (SASB) Investor Advisory Group and WRI's Sustainable Investment Advisory Council. She received an M.A. degree in International History from the University of Edinburgh, Scotland.

Eileen Kirkwood, CFA, CAIA*

*Principal, Consultant and Investor Relations
BentallGreenOak*

Marley Kornreich*

*Partner and Co-Head US Institutional Client Services
Orbis Investments*

Founded in 1989, Orbis Investments is a privately owned, contrarian global equity asset manager with roughly \$38 billion in AUM. Marley joined Orbis in 2011 and dedicates her time to working with



Speaker, Moderator & Conference Committee Biographies



US-based institutional investors and consultants. She heads a variety of business, client, and investment-related initiatives. Marley is also a member of the firm's US Board of Directors.

Marley holds a Bachelor of Arts in Economics and International Relations with Distinction from Stanford University where she was the Baccalaureate Student Speaker. She also earned a Masters of Business Administration from Harvard Business School. Prior to Orbis, she worked in consulting at Mercer.

Tamara Larsen

Executive Director

Agility

Tamara Larsen is an Executive Director with Agility, where she leads the Mission-Aligned Investment practice of the firm and sits on the Agility Investment Committee. Tamara is responsible for partnering with clients to further align their investment portfolio with their values. She has +20 years of investment experience.

Prior to joining Agility, Tamara worked for Russell Investments, where she most recently served as Head of Private Markets Research and was a portfolio manager for a thematic impact investing mandate. Before joining Russell, Tamara was Senior Vice President of Centerline Capital Group. Her prior roles included Lehman Brothers, Thor Equities, and J.P. Morgan.

Tamara earned a MSc in Real Estate Development from the Massachusetts Institute of Technology, where she was a Toigo Foundation fellow, and a B.A. in Economics from Smith College. She serves on the boards of Colorado PBS12, the Public Welfare Foundation, the Clara Lionel Foundation, and a renewables venture focused on Africa. She is a member of the Investment Committee for the David Rockefeller Fund, Co-Chair for the Executive Committee for the Intentional Endowments Network and serves on the Membership Committee for Confluence Philanthropy.



Leslie Lenzo, CFA

Chief Investment Officer, SVP Investments

Advocate Health Care

In her role at Advocate Aurora, Ms. Lenzo oversees the investment of \$12 billion in corporate and pension assets. She also oversees the investment options available in the organization's \$7 billion defined contribution plans. Prior to Advocate Aurora, Ms. Lenzo was a senior member of the investment team at Northwestern Memorial Healthcare in Chicago. Ms. Lenzo started her career with the investment program at Partners Health Care in Boston and then moved to the sell side to do equity research covering Healthcare Services at SG Cowen. Ms. Lenzo holds a BA in Economics and Government from Georgetown University and a MBA in Finance from Boston University. She is also a CFA charter holder and serves on the investment committee of the Healthcare Financial Management Association. Ms. Lenzo resides in Downers Grove with her husband and four young sons.



James Lucier

Managing Director

Capital Alpha

James Lucier is a Managing Director at Capital Alpha, where he leads the energy, environmental, and macro strategy practices. Lucier provides predictive, insightful analysis of trends in Washington

Speaker, Moderator & Conference Committee Biographies



for an array of clients including asset managers, private equity investors, commodity traders, investment bankers, and corporates. His fields of expertise include tax and trade policy as well as domestic U.S. energy production, alternative energy, energy infrastructure and electric power, especially as they are impacted by regulation, litigation, and the U.S. political cycle. Before co-founding Capital Alpha Partners in 2007, Lucier was a Senior Vice President at Prudential Equity Group, where for nine years he was a member of Prudential's well-known Washington strategy group (repeatedly ranked #1 by Institutional Investor Magazine) and of equity research teams covering oil & gas, power & utilities, and industrials. He's a graduate of Princeton University.

Lauren Mathias

*Senior Vice President, Global Manager Research
Callan LLC*

Lauren E. Mathias, CFA, is a senior vice president and non-U.S. equity investment consultant in Callan's Global Manager Research group. Lauren is responsible for research and analysis of non-U.S. equity investment managers and assists plan sponsor clients with non-U.S. equity manager searches. In this role, Lauren meets regularly with investment managers to develop an understanding of their strategies, products, investment policies, and organizational structures. Lauren also oversees the Callan Connects program, which enhances Callan's coverage of emerging managers and diverse-, women-, and disabled-owned firms. Lauren is also co-chair of Callan's Inclusion Committee and is a shareholder of the firm.

Lauren joined Callan's Client Report Services group as an analyst in 2004 and was a member of the U.S. equity research team from 2007 to 2017. Prior to Callan, she assisted an independent financial planner in preparing financial plans for individual investors.

Lauren graduated from California Polytechnic State University, San Luis Obispo, magna cum laude, with a BS in business administration, concentrating in financial management and enterprise accounting with a minor in statistics. She is a holder of the right to use the Chartered Financial Analyst® designation.

Christa Maxwell, CFA, CIPM*

*Head of Marketing and Business Development
Acuitas Investments.*

Christa oversees and executes on the strategic plan to increase visibility and exposure of Acuitas' offerings to the investment community.

Prior to joining Acuitas, Christa was the Director of Business Development for Kennedy Capital Management where she was responsible for marketing the firm's U.S. equity strategies to institutional consultants and investors. She also worked at Westwood Management Corporation focusing on business development within the western U.S. She began her career with Thornburg Investment Management and spent over 10 years with the organization where she oversaw various regions and was responsible for client service, consultant relations, and business development.

Christa earned her BBA in Finance from the University of New Mexico's Anderson School of Management. She holds her Series 7 and 66 and is a CFA charterholder. Christa currently serves on boards for the University Health System (San Antonio), the CFA Society San Antonio and the Association of Investment Management Sales Executives (AIMSE).



Speaker, Moderator & Conference Committee Biographies



Sean McCoy*

Managing Director, Artisan Partners

Sean H. McCoy is a managing director of Artisan Partners and the business leader for the firm's Sustainable Emerging Markets team. Prior to joining Artisan Partners in December 2016, Mr. McCoy was a consultant relations director at Investec Asset Management, North America and, before that, a director and senior consultant at Intersec Research, LLC focusing on non-US and EM equity strategies. Earlier in his career, Mr. McCoy was a global equity research specialist at Roca-ton Investment Advisors, LLC. Mr. McCoy began his career at Bank of Ireland Asset Management (US) and holds a bachelor's degree in psychology from Fairfield University.



Paul Mirabella

*Managing Director, Wealth Management & Investments
City National Bank*

Paul Mirabella leads City National Bank's Wealth Management division, as the Managing Senior Vice President and Managing Director of City National Wealth Management.

Drawing upon more than 20 years of wealth and investment management experience, Paul is focused on developing, directing and delivering sophisticated investment solutions to City National Bank's premier clients. Throughout his career, Paul's expertise focuses on providing consultative investment services to High Net Worth families, Charities, Endowments and Foundations.

Paul's foothold in wealth management utilizes the products and processes of Institutional client groups and combines the benefits of big bank scale with the personalized service and access of City National's community oriented bank.



Sara Mongerson*

*Managing Director of Investor Relations
Smith Group Asset Management*

Ms. Mongerson first joined Smith Group Asset Management in October 2003 and served in institutional sales and client service until 2010. During her time away from Smith Group, she raised capital for a variety of private equity funds and for an emerging quantitative manager. She rejoined the firm in January of 2019 as Managing Director of Investor Relations. Ms. Mongerson has over 25 years of experience in institutional asset management business development and client service including prior roles with Loomis Sayles and Columbia Management. She earned her MBA from DePaul University Kellstadt Graduate School of Business, and her BS in Finance from Illinois State University. Ms. Mongerson is an advisory board member of the DePaul University Department of Finance Driehaus Center for Behavioral Finance. She is also a member of NASP, AIMSE, and II VINS, as well as the chair of the firm's ESG committee.



Darren Myers

*Partner, Director of Research
Agility*

Darren Myers is a Partner at Agility and Director of Research for the firm. He also leads Agility's Absolute Return investment program. Prior to joining Agility, he served as a Senior Research Analyst at Tejas Securities Group, Inc., where he provided investment recommendations on special situation and distressed debt opportunities. Darren was previously a Senior Analyst at UTIMCO focusing on

Speaker, Moderator & Conference Committee Biographies



hedge fund investments for the \$3 billion Marketable Alternative Investments portfolio. He also worked at Perry Capital, LLC, a multi-billion dollar private investment management firm. Darren holds a BA degree in the Plan II Honors Program and an MBA, both from the University of Texas at Austin. He also serves on the MBA Advisory Board at the University of Texas at Austin. Darren is a CFA® charterholder. He is an active endurance athlete, completing the Atacama Crossing, a 150 mile ultramarathon in the Chilean desert, and an Ironman triathlon.

Anthony Novara

*Principal, Research Director – Global Hedge Fund Strategies & Capital Markets
Fiducient Advisors*

Anthony joined Fiducient Advisors in 2011. Anthony directs the firm's Hedge Fund research effort and chairs the firm's Capital Markets Team. He is a voting member of the firm's Investment Committee and a member of the firm's Discretionary Committee, Research Forum and Global Hedge Fund Strategies Group. Prior to joining the firm, Anthony held various roles at National City, Conversus Asset Management and William Blair & Company. Anthony received a BA in Finance from the Eli Broad College of Business at Michigan State University and an MBA from the University of Chicago Booth School of Business with concentrations in Analytic Finance, Economics & Entrepreneurship. He is a CFA® charterholder and member of the CFA Society Chicago and CFA Institute. Anthony is actively involved with YearUp, a nonprofit providing urban young adults with the skills, experience and support to pursue professional careers and higher education. He is also on the Advisory Board for the Michigan State University Financial Markets Institute. In his free time, Anthony enjoys playing guitar, golf, running after his two young sons and all things Michigan State Spartans.

Jessica Gelhar Noviskis, CFA

*Senior Research Analyst, Hedge Funds
Marquette Associates*

Jessica Noviskis, CFA is a Senior Research Analyst for Marquette Associates and has 13 years of investment experience. She joined Marquette in 2020 and is responsible for leading the due diligence of hedge fund managers, providing guidance on hedge fund product selection, and developing actionable views based on a macroeconomic and capital markets outlook. She is a member of the firm's investment committee and alternative investment manager search committee.

Prior to joining Marquette, Jessica was a senior analyst at 1060 Capital Management where her team managed a long/short equity hedge fund. Previously, she was a vice president at Brookfield Investment Management and an analyst at Artisan Partners.

Jessica holds a B.B.A. in Finance, Investment and Banking from the University of Wisconsin-Madison and an M.S.M. in Finance Analysis from the University of Wisconsin-Milwaukee Lubar School of Business. She is a CFA charterholder and a member of the CFA Institute and the CFA Society of Chicago.

Rich Nuzum, CFA

*President, Investments & Retirements
Mercer*

Rich Nuzum is President of Mercer's Investments & Retirement business and a member of Mercer's Executive Leadership Team. Rich is also the Executive Sponsor for Mercer's Pride Business

Speaker, Moderator & Conference Committee Biographies



Resource Network. 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. Rich holds an MBA (with high honors) in analytic finance and accounting from the University of Chicago and a bachelor's degree (with honors) in mathematical sciences and mathematical economic analysis from Rice University in Houston, Texas. Rich also did graduate work in international economics at Tokyo University. He is a CFA® charterholder and a member of the CFA Institute. Rich received CIO's 2017 Industry Innovation Award as Consultant of the Year.

Molly Ono*

*Director, Western Region, Client Service & Business Development
Impax Asset Management*

Molly Ono leads Impax's West Coast client service and distribution efforts and serves as co-head of consultant relations. She has 20 years of industry experience working with a range of asset owners, consultants and wealth managers across asset classes. She brings a passion for and specialized expertise in sustainable investment and ESG topics. Prior to joining Impax, Molly was a member of Invesco's Institutional Distribution Team where she worked with Endowments, Foundations, Corporate and Public Plans and Taft Hartley investors. Molly is a graduate of University of Oregon and is currently pursuing an advanced degree at Portland State University.

Yoel Prasetyo, CFA, CAIA

*Senior Fixed Income Researcher
Russell Investments*

Yoel Prasetyo is a senior fixed income researcher for Russell Investment, where he conducts manager research, mainly in the broad U.S. fixed income, emerging market debt, currency, and absolute return fixed income strategies for Russell Investments' OCIO and multi-manager product suite and global consulting client solutions. Yoel joined Russell Investments in 2010 and had worked for Dell Inc. and Coca-Cola Enterprises in multiple capacities.

Eric Ralph, CFA

*Managing Director & Director of Portfolio Operations
Highland Associates*

Mr. Ralph joined Highland Associates in early 2018 and serves as a consultant to the firm's institutional client base specializing in not-for-profit healthcare assets and foundations. He is a managing director of the firm. Mr. Ralph serves on the firm's Leadership Working Group and is a voting member on Highland's Investment Working Group. He serves as the firm's Endowments and Foundations Practice Lead. He is located in St. Louis, Missouri, at the firm's second office location. Prior to joining Highland Associates, Mr. Ralph served as principal and managing director at Summit Strategies for more than 17 years. He proactively provided investment recommendations and investment program development for endowments, foundations, pensions, long-term investment pools, and hospital operating assets. He is a member of the CFA Society of St. Louis, the St. Louis Area Foodbank Board's Executive Committee, and the Investment Committee of Community School and MICDS.



Harvey Rosenblum, Ph.D.

Professor of Practice in Business, Economics

Cox School of Business, Southern Methodist University

Dr. Harvey Rosenblum is professor of business and financial economics in the Cox School of Business at Southern Methodist University where he has taught since 1986. After a 43-year career with the Federal Reserve System, Rosenblum retired from the Federal Reserve Bank of Dallas as Executive Vice President and Director of Research in November 2013. Rosenblum joined SMU as a full-time faculty member in 2014. Rosenblum has a B.A. from the University of Connecticut and a Ph.D. in economics from University of California Santa Barbara. His research focuses on US macroeconomic and financial policies and on ways to mitigate the impacts of financial crises. Rosenblum is a past President of the National Association for Business Economics; he has served on the Board of Directors of many professional associations including the National Bureau of Economic Research and the Western Economic Association International. He also served for five years on the board of directors of an NYSE-listed corporation.



George Scott

Senior Real Estate Investment Officer

New York State Common Retirement Fund

George Scott is a Senior Real Estate Investment Officer at the New York Common Fund. He is primarily responsible for sourcing, structuring, negotiating and monitoring equity investments on behalf of New York Common with both domestic and global fund managers, joint venture partners, operators and sponsors across various property types. Prior to joining New York Common, George was the Director of Capital Markets at Urban Investment Partners, a multifamily real estate investment management firm based in Washington, DC. Before joining Urban Investment Partners, George was a Senior Manager in Ernst & Young's Transactional Real Estate practice, specializing in underwriting, real estate structuring, due diligence, and execution on both the buy and sell side. He began his career after undergraduate as an analyst in the real estate investment banking group at Morgan Stanley and continued this focus after business school when he joined Security Capital Group which was a firm focused on applying the private equity investment model to investing in real estate operating companies across various property types.

George earned his Bachelors from Morehouse College and his Masters of Business Administration from the Kellogg School of Management at Northwestern University. George is a volunteer at the Imani House Adult Literacy Program in Brooklyn and a member of the Literary Swag Book Club and the Brooklyn Track Club. He is also an advisory board member of the Big Apple Leadership Academy for the Arts located in Brooklyn.



Paige Scott

Senior Partner

Kingsley Gate Partners

Paige Scott was most recently Managing Director and Head of the U.S. Asset Management Practice and member of the U.S. Executive Committee of a global financial services retained search firm. Over a career that spans over two decades, Paige has had leading roles in building out the U.S. Asset Management Practice of Sextant Search Partners and served as a Senior Client Partner in the Asset Management Practice at Korn/Ferry International. She infuses this experience with our state

of the art scientific, cloud based tools to assess candidates to ensure the executives that she places have the best holistic fit with her clients.



Ryan Siebers, CFA

Research Analyst

Asset Consulting Group

Ryan joined ACG in 2019 as a Research Analyst. His responsibilities include the identification, analysis, and ongoing due diligence of US large cap investment strategies. Prior to joining ACG, Ryan worked at Stifel Nicolaus where he conducted manager due diligence for the firm's separate account strategy offerings. Ryan earned a BS in Business Administration from Murray State University in Kentucky. He holds the Chartered Financial Analyst designation and is a member of the CFA Society of St. Louis and the CFA Institute.



Kirk Sims, CFA

Director, Head of Emerging Manager Program

Teacher's Retirement System of Texas

Kirk Sims heads TRS' Emerging Manager Program. Since being established in 2005, TRS has committed \$4.4 billion to one of the largest programs of its kind. An additional \$3.1 billion has been invested directly with EM Program graduates. Each graduate was selected as a result of consistent outperformance among a group of more than 160 EM managers. Recognizing the Program's success, in early 2019, TRS rolled out a plan to invest another \$3 billion over the next three to five years.

Sims joined the Teacher Retirement System of Texas on March 1, 2019. Before joining Texas Teachers, he was a Senior Investment Officer for the Teachers' Retirement System of the State of Illinois. Sims had oversight and management responsibility of TRS's Emerging Manager Program, a \$750 million evergreen pool of capital designed to identify and invest in emerging investment managers across all asset classes.

Prior, Sims worked at Prudential Retirement where he was responsible for a manager of manager's retirement platform as well as an open architecture investment platform. He also has a background in asset management and has held various positions with both large and small asset managers.

Sims is a CFA charter holder and holds a Master's in Business Administration from the Columbia University Graduate School of Business. He received a Bachelor of Business Administration from Howard University in Washington, DC.



Matthew Smagacz, CFA, FRM

Senior Investment Officer

State of Wyoming

Matthew Smagacz, CFA, FRM is the Senior Investment Officer of the Wyoming State Treasurer's Office where he is integral in managing the \$22 billion sovereign wealth portfolio. He has seventeen years of buy-side experience, specializing in investments across the alternatives space. He holds a BSBA in Finance from Washington University in Saint Louis and is a member of the Global Association of Risk Professionals, the CFA Society of Chicago, the CFA Society of Colorado and the CFA Institute.



Bonnie G. Stanfield, CFA*

*Director, Consultant Relations, Global Institutional Management
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. Ms. Stanfield joined Putnam in 2013 and has been in the investment industry since 2003.

Prior to joining Putnam, Ms. Stanfield was Director of Research and Portfolio Manager, Fiduciary Services Equity Group Trust, at Marco Consulting Group from 2010 to 2013 and Assistant Director of Research from 2009 to 2010; Investment Analyst at UBS Global Asset Management from 2004 to 2008; and Investment Analyst at JL Kaplan Associates from 2003 to 2004.

Ms. Stanfield earned an M.B.A. from The Wharton School of Business, University of Pennsylvania; an M.A. from the School of International and Public Affairs, Columbia University; and a B.A. from Beloit College. She also serves on the Auxiliary Board at the Art Institute of Chicago.



Kieran Stover*

*Senior Vice President, Institutional Sales & Consultant Relations
Carillon Tower Advisers*

Kieran Stover is a Senior Vice President of Institutional Sales & Consultant Relations at Carillon Tower Advisers, a multi-boutique asset management company. He is responsible for marketing Eagle Asset Management, ClariVest Asset Management, Cougar Global Investments, Reams Asset Management (a division of Scout) and Scout Investments strategies in the western United States. Prior to joining Carillon Tower Advisers in 2018, Stover held senior sales roles at firms including Barings, LLC, Kleinwort Benson Investors and Arnerich Massena. He began his career at Advent Software in San Francisco. Stover has 18 years of financial services industry experience. He earned a B.S. in Marketing from Arizona State University. He currently lives in Portland, Oregon.



Matt Sturdivan

*Director of Equity Research
RVK, Inc.*

Matt joined the RVK Portland office in 2007 and is a senior member of the Investment Manager Research team. He serves as Director of Equity Research with coverage including active management across regions, factor-based indexes, and portfolio construction practices. His primary responsibilities include providing education to clients, directing manager search activity, and contributing to thought leadership projects. Matt earned a Bachelor of Science degree in Economics from the University of Oregon and a Master of Science in Economics from Portland State University. He has passed the CFA Level II exam and is a shareholder of the firm.



Chavon Sutton

*Senior Investment Director, Sustainable and Impact Investing
Cambridge Associates, LLC*

Chavon Sutton is a Senior Investment Director in the Sustainable & Impact Investing Research Group at Cambridge Associates, conducting manager research and working with institutional clients to build sustainability –and impact –focused portfolios. She joined Cambridge in 2020 with

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over 10 years of finance experience. Prior to joining Cambridge, she served as the first Director of Diversity and Inclusion and Emerging Manager Strategy for New York City's Bureau of Asset Management, the investment advisor to each of New York City's five retirement systems. There, she led its growth strategy for investment in small, diverse and women-owned investment managers across all asset classes, supported the investment staff's sourcing and due diligence efforts, and created the Bureau's first blueprint for the integration of diversity factors in its investment process.

Kurt Terrien

Managing Director, Investor Relations
Clarkston Capital

Kurt joined Clarkston Capital Partners in 2013 and oversees the firm's institutional investor relations, including sales, consultant relations and client service. Kurt has nearly 30 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.

Emily Thomas, CFA

Executive Director
Morgan Stanley

Emily is the lead Investing with Impact analyst for the Global Investment Manager Analysis (GIMA) team at Morgan Stanley Wealth Management. In this role, she identifies and researches managers across asset classes for Morgan Stanley's Investing with Impact Platform and serves as a resource to Financial Advisors. Prior to joining Morgan Stanley, Emily worked at Cambridge Associates where she identified emerging trends, risks, and opportunities across global investment markets. As part of this role, she provided research for and wrote reports on the growth of the sustainable investing field in conjunction with Cambridge's Mission Related Investing Group.

In 2020, Emily took on an expanded role as a co-leader of the diversity and inclusion efforts within GIMA.

Emily graduated from Washington University in St. Louis with a B.A. and received a Masters from the Fletcher School of Law and Diplomacy at Tufts University. She is also a member of CFA Society New York where she is currently the vice chair of the Sustainable Investing Group.

Andrew Thompson

Managing Director – Asset Management
Sheffield Haworth

Andrew is a Managing Director in the Asset Management practice at Sheffield Haworth. He has spent his career focusing on hiring senior investment and distribution professionals into fund management organisations based across the US and Europe. Andrew originally started his career with Sheffield Haworth in 2011 and holds a BScEcon in Politics from Cardiff University.

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Ian Toner

Chief Investment Officer

Verus

Mr. Toner is responsible for the overall investment output at Verus, for both discretionary and non-discretionary clients. His particular focus is on ensuring that the entire investment resources of the firm are applied in the most effective way for each client, and that the asset allocation, portfolio construction, manager selection and capital market insights created by Verus are both directed at real problems that our clients face, and are implementable in client portfolios.

Mr. Toner is responsible for the final determination of the firm's overall investment positioning. He is responsible for the portfolio management team, risk team, strategic research team, and both the public and private markets teams. He is also a member of the Verus management committee, investment management committees, and is a shareholder of the firm.

He joined Verus in 2013 from Russell Investments, where he was most recently Director, Capital Markets Research, with particular responsibility for research and marketing across the trading floor businesses of Russell globally. Before Russell Investments he was an executive director at UBS Investment Bank in London, and a vice president at both Schroder Salomon Smith Barney and InterSec Research Corp. Earlier in his career he worked on the sell-side of the institutional markets in London, covering European equity markets.



Tonja Truesdell, CIMA*

Relationship Manager

DoubleLine

Ms. Truesdell joined DoubleLine in 2020 as a Relationship Manager, where she specializes in institutional sales and client relations within the Southeast. Prior to DoubleLine, she was with Thornburg Investment Management as a Regional Director. Previous to that, Ms. Truesdell was with Payden & Rygel as a Currency Trader. She holds a BS in Global Business from University of Evansville and a MBA from the University of New Mexico.



Derek M. Tubbs*

Associate Portfolio Manager and Vice President Institutional Development

CornerCap

Derek is an Associate Portfolio Manager and the Vice President of Institutional Development for CornerCap. He joined in 2013 with over 16 years of institutional investor experience and is a non-voting member of the investment committee. His primary responsibility is to expand CornerCap's reach with institutional investors. Prior to joining CornerCap, Derek was a Senior Relationship Manager with a \$15 billion equity team at Wells Capital Management where he was the primary point of contact for institutional clients. Derek started his investment career in 1996 and spent the next 12 years in institutional sales with both CIBC World Markets (formerly Oppenheimer) and Prudential Equity Group. He has an MBA from the Kelley School of Business at Indiana University and earned his BA with honors from Texas A&M University.



Tim Urban

Since he started writing the long-form, stick-figure-illustrated blog Wait But Why in 2013, Tim Urban has become one of the internet's most popular writers. Urban, according to Fast Company, has "captured a level of reader engagement that even the new-media giants would be envious of." Vox describes Urban's articles as "...a feast. At the end, you feel sated, like you just learned the shit out of something, like you get something in a way you didn't before ... you will understand the world better for reading them."

A world tired of a flood of short, shallow listicles quickly noticed—two months after Wait But Why was born, Urban's article Why Generation Y Yuppies Are Unhappy swept the internet, becoming both the most shared and most commented-on article of the month on all of Facebook. Urban has since produced dozens of viral articles on a wide range of topics, from why we procrastinate to why artificial intelligence is scary to why we haven't seen any signs of aliens. His articles have been regularly republished on sites like Quartz, The Washington Post, The Atlantic, Time, Business Insider, and Gizmodo. In 2015, Fast Company wrote that "Wait But Why is disproving the notion that thoughtful, long-form content and virality are mutually exclusive."

Today, Wait But Why receives over 1.5 million unique visitors per month on average, with some month's visitors topping 10 million, and the blog has over 380,000 email subscribers. The Wait But Why community of readers is also highly engaged, with every article generating hundreds of thoughtful, intelligent reader comments and some reaching well into the thousands.

Urban has gained a number of prominent readers as well, like authors Sam Harris and Susan Cain, Twitter co-founder Evan Williams, TED curator Chris Anderson, and Brain Pickings' Maria Popova. Recently, Urban received a call from Elon Musk, who told Urban he liked his writing and asked Urban if he'd like to interview him and write about his companies. Urban accepted, and spent the next six months writing a thorough blog series that Vox's David Roberts called "the meatiest, most fascinating, most satisfying posts I've read in ages." Since then, Urban's relationship with Musk has continued, as Musk invited him to host SpaceX's launch webcast and solicited Urban's input and slide illustrations in a talk he did at the December 2015 Climate Change Conference in Paris.

As Urban has taken off as a writer, requests for him to speak have steadily increased. He has done talks at companies like Facebook, Chartbeat, and Thumbtack, schools like MIT, Brown, and Stevens Tech, and conferences like Effective Altruism in Mountain View, Social Media Week in New York, and Sweden's Øredev, after which conference head Anders Janmyr tweeted that Urban's talk was "the best keynote in years." Urban was also selected to speak at the 2016 TED Conference in Vancouver. Like his writing, Urban's talks span many topics, involve stick figures, and combine depth and impact with humor and entertainment to delight and inspire his audiences.



Millie Viqueira

*Executive Vice President and Head of Fund Sponsor Consulting
Callan*

Millie joined Callan in 1991 and has more than 20 years of experience in investments and pension consulting. Millie works with a variety of fund sponsor clients including corporate defined benefit and defined contribution plans, public fund retirement plans, and nonprofits. She also has oversight responsibility for Callan's New Jersey consulting office and is a member of Callan's Management,

Institute Advisory, Manager Search, Defined Contribution, and Editorial committees. Millie is a shareholder of the firm.

Prior to joining the firm, Millie was an assistant vice president at Shearson Asset Management, responsible for coordinating institutional marketing efforts. She also served as an associate consultant in the New York branch of SEI Corporation.

Millie received her BA in political science from Princeton University.

Britt Vriesman

*Senior Manager Research Analyst
RVK, Inc.*

Britt joined RVK, Inc. in 2005 as an Investment Analyst located in our Portland office. He was promoted to Manager Research Analyst in 2012 and to a senior-level analyst in 2014.

Britt's primary responsibilities include equity searches, investment manager meetings and ad-hoc client requests.

Prior to joining RVK, Britt worked as an assistant financial planner with Spaulding Financial. He earned a Bachelor of Business Administration with a concentration in Finance from the University of Portland. He has passed CFA Level I.

Bing Waldert

*Managing Director, U.S. Research
Cerulli Associates*

Bing Waldert leads Cerulli's U.S. Research team comprising seven research practices that cover all elements of the U.S. asset management, wealth management, and retirement markets. He has authored Cerulli reports on the wealth management industry, high-net-worth market, the annuity industry, and retirement markets. He is a frequent board-level and C-suite speaker and well-regarded industry thought leader. He has spoken in front of the Investment Company Institute (ICI), the Asset Management Association of China (AMAC), the Investments and Wealth Institute (IWI), and the Money Management Institute (MMI).

He has worked on client projects on emerging manager expansion strategies, independent registered investment advisors (RIAs), multi-family offices (MFOs), investment platforms, and the outsourced chief investment officer (OCIO) industry. In addition, he has advised multiple private equity firms on acquisitions in the wealth management space.

Prior to joining Cerulli in 2004, Bing worked in product management and competitive research for MFS and Sun Life.

Davis Walmsley

*Head of Client Relationships, Investment Management
Greenwich Associates*

As the Head of Client Relationships for Greenwich Associates' Investment Management practice, Davis leads a team of consultants dedicated to delivering insights and positively impacting asset managers around the world. Davis has extensive experience working with investment managers in North America to address a variety of distribution, marketing, and product-related challenges and opportunities. Previously, Davis was a Director in Barclays Investment Banking FIG practice where



he provided M&A and capital markets advice to asset management clients. Davis received his BS in Finance and Economics from Lehigh University and his MBA from the Harvard Business School.



Charlotte Walsh, CFA*

Managing Director

Jennison Associates, LLC

Charlotte is a client relationship manager in Jennison's consultant relations group. Before joining Jennison in 2020, Charlotte was a consultant relations director at ClearBridge Investments. She previously held consultant relations positions at Putnam Investments, Ranieri Partners Management, Allegiant Asset Management, Oppenheimer Capital, and Banc One Investment Advisors/JP Morgan Asset Management. Earlier in her career, she was a consultant at Stratford Advisory Group and William M. Mercer Investment Consulting.



Thomas H. Warbuton, CFA

Director, Investment Research, North American Equities

Russell Investments

Tom Warburton became the head of equity research, North America in 2016. In that capacity, he is responsible for managing the U.S. large cap, U.S. small cap and Canadian equity manager research teams. In addition, he is specifically responsible for the research and ranking of managers within the U.S. large cap growth and market-oriented styles. He provides manager recommendations to Russell Investments institutional consulting clients and multi manager funds. Prior to this role, Tom had served as head of equity research, U.S. Large Cap from 2013 to 2016. Tom re-joined Russell Investments as a senior manager research analyst in 2008. He also worked as a research analyst and senior research analyst at the firm from 2000 to 2006, covering U.S. small cap managers. From 2006 to 2008, Tom served as a co-director of research for Bristlecone Advisors, a Seattle multi-family wealth management office. In this role, he had the sole responsibility for manager recommendations and oversight for equity and fixed income assignments. He also worked on the firm's investment committee to develop asset allocation targets for client portfolios. Between 1991 and 1998, Tom worked in the real estate and construction management industries. During this time he served stints with Cushman & Wakefield, Walbridge Aldinger Company and Northern Michigan Glass. Tom is a member of the CFA Institute and the Seattle Society of Financial Analysts.



Kelli Washington, CFA

Managing Director of Research & Investment Strategy

Cleveland Clinic Investment Office

Kelli joined the Cleveland Clinic Investment Office in 2017 as a member of the inaugural team tasked with building a fully discretionary insourced investment office. In her role, Kelli is primarily responsible for monitoring portfolio asset allocation policies, maintaining the macroeconomic research function and collaborating with the CIO on research that directs tactical asset allocation, investment decisions and hedging strategies for approximately \$11.9 billion in assets across four investment pools. Additionally, Kelli conducts manager due diligence across long-only, hedged and private asset classes.

Prior to joining the Cleveland Clinic Investment Office, Kelli was a Managing Director of Investments with Cambridge Associates where she was responsible for manager selection, investment implementation and strategy for a variety of nonprofit institutions. Prior to joining Cambridge

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Associates, Kelli was an Endowment Officer at Bowdoin College as well as a Senior Due Diligence Analyst with Edward Jones Investments and Portfolio Manager with the Edward Jones Trust Company in St. Louis.

Kelli is the Executive Chair of the Alumni Board of Governors at Washington University in St. Louis as well as a member of the Washington University Board of Trustees, serving on the Finance and Undergraduate Experience Committees. From 2011-2013, she was an Investment Committee Member for the Crittenton Women's Union (now EMPATH) in Boston, MA. Additionally, from 2011 to 2014, Kelli was a Robert Toigo Foundation Alumni Regional Vice-President in Boston, MA and Washington, D.C. Kelli is a CFA Charterholder, holds a B.S. in Business Administration from Washington University in St. Louis and an M.B.A from the Yale School of Management.

Jay Wiltshire, CFA*

*Director, Institutional Client Relations
Epoch Investment Partners, Inc.*

Jay is a member of the Institutional Client Relations Group and is responsible for leading Epoch's business development efforts in the western region of the United States. Prior to joining Epoch in 2019, Jay was a Vice President of Business Development and Institutional Relationships at TD Greystone Asset Management. Jay previously held business development roles at State Street Global Advisors, Capital Guardian Trust Company and Franklin Templeton Institutional. Jay has a Bachelor of Commerce from The University of Toronto and is a Chartered Financial Analyst.

Keith Wosneski

*Head of U.S. Institutional & Global Consultant Relations
Mackenzie Investments*

Keith Wosneski, Head of U.S. Institutional & Global Consultant Relations, is responsible for U.S. business development and building consultant relationships globally. He started his financial services industry experience in 1994. Prior to joining Mackenzie Investments in April 2018, he served as a Consultant Relations Officer at a well-known U.S. asset management firm.

Mr. Wosneski holds the Series 7, 6 and 63 securities licenses with FINRA. Mr. Wosneski earned an MBA from the University of Notre Dame, Mendoza College of Business and holds a BSBA in International Business from the University of Denver. He sits on the Board of Directors at the Association of Investment Management Sales Executives (AIMSE).

Schedule at a Glance



AIMSE

TUESDAY, MAY 18TH, 2021

1:00 pm ET – 1:15 PM ET

President's Welcome**Speakers:***Kurt Terrien, Clarkston Capital**Sean Clark, Westwood Management**Christa Maxwell, Acuitas Investments*

1:15 pm ET – 2:15 pm ET

State of the Industry: Another New Normal, What's Next for Investment Consulting?**Moderator:***Peter Crivelli, Carillon Tower Advisers***Speakers:***Rich Nuzum, Mercer**Millie Viqueira, Callan*

Join us for a fireside chat with Millie Viqueira of Callan Associates and Rich Nuzum of Mercer. These two senior consultant leaders will address how COVID-19 has changed the way their firms engage institutional clients, conduct research on the investment strategies AIMSE members offer and the impact of technology on what has historically been a people business. Millie and Rich will also comment on in-person vs virtual conferences and how they are planning for the post-vaccine era. This will be a recorded session followed by a live Q&A discussion. Get your questions ready!

2:20 pm ET – 3:05 pm ET

Political & Economic Update: The View from Washington**Moderator:***Sean Clark, Westwood Management***Speakers:***James Lucier, Capital Alpha Partners**Harvey Rosenblum, SMU & ex-Dallas Fed*

Having rebounded from a deep, pandemic-induced recession, the U.S. economy stands at a critical juncture. The prospects for a strong recovery appear good, although rising bond yields and harbingers of inflation have at times rattled the markets. All eyes will be on Washington as the new administration and Fed chart the course of the country's future growth. This panel will examine the consequences of proposed fiscal policies, including potential tax hikes and infrastructure spending, along with the role of monetary policy. How will the Fed sustain the recovery without overheating the economy? What will be the long-term effects of the unprecedented stimulus spending? How will frictions within the Democratic and Republican parties influence the debate over these important issues? Please join our experts for what will surely prove to be a timely and engaging discussion.

Schedule at a Glance



AIMSE

3:05 pm ET – 3:30 PM ET **Networking & Exhibitor Booth and Lounge Break**

Visit our exhibit booths and network with peers and exhibitors in the lounge!

3:30 pm ET – 4:15 pm ET **International & Emerging Markets Equity Investing – Podium Changes, Valuation Gaps & Compelling Opportunities**

Moderator:

Sean McCoy, Artisan Partners

Speakers:

Alex Farquhar, Ellwood

Joel Baker, Highland Assoc.

Britt Vriesman, RVK

Lauren Mathias, Callan

Once in a lifetime structural changes and decades-long market dislocations are giving investors much to think about in terms of future equity allocations globally. While economies were impacted by the pandemic worldwide, individual country recovery remains highly idiosyncratic. According to the IMF, China has now displaced the U.S. to become the world's largest economy, and its weighting in many indices is rapidly increasing. This is making it much more challenging for investors to avoid or control their exposure to China. Meanwhile, international markets are trading at their widest discount to the US at any point in the last 20 years. The surging tech sector and stock concentration in the U.S. indices, coupled with any dollar weakness, might be important relative considerations as some of the world's most compelling investment opportunities in consumer staples, consumer discretionary and industrials are arguably found abroad. Our panel will debate whether allocators are currently approaching their international exposures differently.

4:20 pm ET – 4:50 pm ET **InvestmentMetrics Sponsor Showcase: What Asset Managers Need to Know in 2021 About How Fees and Factors Impact Asset Flows**

Speakers:

Damian Handzy

Brendan Cooper

Join us in looking at just what's been driving institutional allocations as we explore the relationships between asset allocations, fund performance, post-negotiated fees, factor styles, and more to answer questions like these:

- Do larger allocations usually go to lower-fee funds?
- Do investors get what they pay for: are higher fees associated with better performance?

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- Do popular styles (growth in 2020, value in 2021) command higher fees?
- Top asset winning funds – what was their performance? Average fees?
- How has the Growth-to-Value rotation impacted allocations?
- Are Value funds now raising fees? Are Growth funds lowering them?

5:00 pm ET – 6:00 pm ET **Networking**

WEDNESDAY, MAY 19TH, 2021

1:00 pm ET – 2:00 pm ET **The Secret Behind Communicating Concepts in a Way that Delights**

Moderator:

Christa Maxwell, Acuitas Investments

Speaker:

Tim Urban

2:05 pm ET – 2:50 pm ET **Allocator Perspectives – 2020 Won?**

Moderator:

Tonja Truesdell, DoubleLine

Speakers:

Eric Ralph, Highland Associates

Steve Herbert, Kentucky Retirement System

Jeremy Heer, University of Chicago

Market performance surprised during a year unlike any other in recent memory. The impacts felt will have lasting implications, but perhaps there were some gifts of insight gained that we can employ. In this panel, hear from allocators offering varied perspectives as they reflect on how their organizations managed through 2020, lessons learned, and what they will carry forward into 2021 and beyond.

2:50 pm ET – 3:15 PM ET **Networking & Exhibitor Booth and Lounge Break**

Visit our exhibit booths and network with peers and exhibitors in the lounge!

Schedule at a Glance



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3:15 pm ET – 4:10 pm ET

U.S. Equities- Who Won, How to Structure Portfolios to Win, and What Happens Next?

Moderator:

Charlotte Walsh, Jennison Associates, LLC

Speakers:

Jeff Gabrione, Buck

Tom Warburton, Russell Investments

Samantha Grant, Marquette Associates

Eric Huff, LCG Associates

Ryan Siebers, Asset Consulting Group

We've gathered experienced researchers from several leading consulting firms to address topical issues regarding domestic equities. Our panel will debate a number of timely questions, including:

- How to assess the concentration of "winners" within the indices?
- Is the tide turning back to active?
- Structuring U.S. Equity allocations – is value/growth not dead, but different?
- How to handle capitalization concentration – exposure vs flexibility?
- What is the growing difference between DB and DC needs?"

4:15 pm ET – 5:00 pm ET

The Nexus of Wealth Management and Institutional Practices

Moderator:

Jay Wiltshire, Epoch Investment Partners, Inc.

Speakers:

David Hyman, Mercer

Bing Waldert, Cerulli Associates

Paul Mirabella, City National Bank

This panel will discuss a myriad of issues challenges and opportunities related to the institutionalization of wealth. Our panel of experts will define the channel, identify notable practitioners and assess the scope of opportunity for marketers. They will also address the current mergers and acquisitions landscape and discuss the continued evolution of the research process. Most importantly, they will focus on the end client, their ever-changing needs and how best to serve them.

5:00 pm ET – 6:00 pm ET

New Member Reception

THURSDAY, MAY 20TH, 2021

1:00 pm ET – 2:00 pm ET

The Future of Distribution: Disruption & Opportunity**Moderators:***Sean Clark, Westwood Management**Christa Maxwell, Acuitas Investments***Speakers:***Davis Walmsley, Greenwich Assoc.**Paige Scott, Kingsley Gate**Andrew Thompson, Sheffield Haworth*

The global pandemic imposed enormous changes on the way we conduct business and accelerated trends already in place. This panel will examine the current landscape of the asset management industry and assess the evolving role of distribution professionals. What skills will be essential to succeed in a post-vaccine world? Will the acceptance of virtual meetings alter staffing needs, travel routines and calling activities? How can distribution professionals ensure they remain relevant? Please join this live session which is certain to provide valuable insights regarding the trajectory of our careers.

2:05 pm ET – 2:50 pm ET

ESG. It's What's for Dinner**Moderator:***Ian Toner, Verus***Speakers:***Emily Thomas, Morgan Stanley**Kirsty Jenkinson, CalSTRS**Tamara Larsen, Agility*

This year's ESG panel takes a page from our moderator, Ian Toner, CIO at Verus. Coordinating a meal with a large family can mean confronting a range of differing diet restrictions, affected by religious beliefs, health conditions, and personal preferences. The waiter at a restaurant plays an important role in helping the family navigate their complex dietary needs in arriving at a final order for the table. A similar situation exists regarding sustainable investments and ESG among institutional investors.

Our panelists, industry leaders in ESG, will showcase their tastes, preferences and unique approaches to identifying risk and opportunity through sustainable investment. How do they define sustainable investment? What factors driving their decision-making process? How do they manage differing internal stakeholders? How to rate and assess sustainability in their portfolio? We'd like our audience to leave with a better understanding of how to better meet the broad spectrum of investor palates and desires, and work more effectively to satiate the ESG appetite.

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2:50 pm ET – 3:20 pm ET

Networking & Exhibitor Booth and Lounge Break

Visit our exhibit booths and network with peers and exhibitors in the lounge!

3:20 pm ET – 4:05 pm ET

Fixed Income 2021 – Where Do We Go from Here?

Moderator:

Greg Graziano, Lazard Asset Management, LLC

Speakers:

Will Beck, Wilshire

Keith Berlin, FEG

Yoel Prasetyo, Russell Investments

As we face the prospect of rising yields and inflation, we will take a closer look at future allocations in a rebounding economy. We will tackle these questions and more: Is core fixed income dead? In the search for yield, how much risk are investors willing to take? Are allocators holding back allocations to fixed income and if so, where are they going? Are green bonds a logical starting point for investors when considering alignment with capital preservation? How do current credit spreads impact allocations? Please join our panel of consultant experts for an in-depth discussion of the fixed income asset class.

4:10 pm ET – 4:55 pm ET

After the Pandemic – The Future of Real Estate

Moderator:

Eileen Kirkwood, BentallGreenOak

Speakers:

Sally Haskins, Callan

Kirloes Gerges, Aon Townsend

George Scott, New York State Common Retirement Fund

One year after the onset of the pandemic, we will examine its impact on the real estate industry. Has it temporarily altered our behaviors, or will the effects be long lasting? Has the pandemic merely accelerated trends that were already underway? Join us for a discussion of the pandemic's effect on various property types and how this and other factors are influencing investors' decision making, portfolio allocations and manager selection.

5:00 pm ET – 6:00 pm ET

Networking Event

FRIDAY, MAY 21ST, 2021

1:00 pm ET – 2:00 pm ET

Permission: Granted to Get Rid of Your B.S.*Speaker: Risha Grant*

Whether implicit or conscious, bias is the number one threat to humanity and any company's success. If your company's goal is to create cohesiveness within your organization, increase revenue, be innovative and/or elevate your reputation- the bias in your workforce and community is a roadblock. You know the problem. Permission: Granted is your answer.

Throughout this session, Risha allows attendees to authentically express their biases, while giving them easily applicable tools to get over them, however screwed up they may be. Although diversity can often be an uncomfortable topic, Risha's approach helps attendees to easily understand the concept, without feeling bored or judged.

Risha Grant teaches Diversity & Inclusion through the lens of humanity using terms like B.S. or Bias Synapse as a way to explain our brain's involvement in the processing and validation of bias.

Attendees will leave this talk with:

- An understanding of Diversity & Inclusion
- A thorough awareness of their biases
- A realization of how their biases originated
- A recognition of the symptoms and results of bias
- Tools to address bias internally and externally
- Tips to navigate the "hot spots" of workplace diversity"

2:00 pm ET – 2:45 pm ET

Diversity, Equity and Inclusion (DE&I) Implementation- The Future Has Arrived**Moderator:***Chavon Sutton, Cambridge Associates***Speakers:***Kirk Sims, Teacher's Retirement System of Texas**Leslie Lenzo, Advocate Health Care**Jessica Hart, Northern Trust Asset Management*

Investors are increasingly sharpening their focus on diversity, equity, and inclusion within their portfolio management and manager selection process. How are asset owners and consultants considering DE&I in their appraisal and selection of managers? Beyond tracking employee demographics, how does an investor assess a manager's progress on DE&I and what cultural assessments take place? Hear from allocators how managers can better walk the walk to drive DE&I initiatives. Please join our distinguished panel for an engaging conversation that will solicit

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thoughts and best practices which we can implement at our own firms and use to further improve industry professional standards.

2:45 pm ET – 3:15 pm ET

Networking & Exhibitor Booth and Lounge Break

Visit our exhibit booths and network with peers and exhibitors in the lounge!

3:15 pm ET – 4:00 pm ET

Considering Alternatives- Where to Turn

Moderator:

Lewis Del Ponte, Harvest Volatility Management, LLC.

Speakers:

Anthony Navara, Fiducient Advisors

Darren Myers, Agility

Matt Sturdivan, RVK, Inc.

Jessica Gelhar Noviskis, Marquette Associates

With Equity Markets at all-time highs and rumblings of fixed income rates on the rise, what are investors to do? We have assembled a panel of top consultant to discuss alternative investments currently available to allocators and their outlook for the space over the near and longer term. Private equity, hedge funds, volatility management and other offerings will be examined by our experts in the context of the current market environment. This session is sure to provide keen insights into the evolving world of alternatives.

4:05 pm ET – 5:00 pm ET

Stewards of Capital

Moderator:

Josh Emanuel, Wilshire

Speakers:

Kelli Washington, Cleveland Clinic Investment Office

Matt Smagacz, State of Wyoming

Lisa Erickson, U.S. Bank Wealth Management

This panel welcomes a diverse line-up of leaders working in various segments of the investment industry, including institutional plans and financial intermediaries. The panelists will provide their unique perspectives on the investment environment and discuss outcomes that they are currently solving for. Please join us to learn about the trends that they are seeing and how those may inform their priorities for allocating capital in 2021. This is also a unique opportunity to learn how their firms adapted to working remotely, and how best to navigate their organizations in the future.

5:00 pm ET – 5:15 pm ET

Closing Cheers

Sean Clark, Westwood Management

Christa Maxwell, Acuitas Investments

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 providing a needed but missing network of career connections, training and support to diverse business school graduates launching careers in finance.

On behalf of the AIMSE membership, the Board of Directors established a scholarship program for participants of the Toigo Fellowship program. The scholarships provide tuition assistance, paid directly to their respective elite graduate MBA business school. In addition to monetary support, the AIMSE Toigo scholarship recipients, past and present, are provided full AIMSE memberships and are invited 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 TOIGO FELLOW SCHOLARSHIP RECIPIENTS

Current Recipients

2020 Recipients, Class of 2022

Chris Mendez, Georgetown University

Jamaal Powell, UCLA Anderson School of Management

2019 Recipients, Class of 2021

George Bahamondes, NYU Stern School of Business

Marissa Feliciano, University of Chicago Booth School of Business

Graduated Recipients:

2018 Recipients, Class of 2020

Karen Nyawera, Harvard Business School

Brandon Yu, Harvard Business School

2017 Recipients, Class of 2019

Ashley Allen, Columbia University Business School

Alex Robles, The Wharton School

Registration Policies



ONLINE REGISTRATION

Online registration is available at www.aimse.org. You must log into your AIMSE website account or create an account as a non-member to complete registration.

EXHIBITOR REGISTRATION

Please refer to the Sponsor & Exhibitor Prospectus for specific policies.

REFUNDS/CANCELLATIONS

Refunds will be granted by AIMSE for requests received in writing by May 7, 2021. An administrative fee of \$250 will be assessed to all refunds. No refunds will be granted after May 7, but another AIMSE member from your firm may attend in your place. **All requests for refunds and/or transfers must be submitted in writing by the registered individual.**

ATTENDEE LIST

Your registration must be received by May 10, 2021 for your name to appear in the digital list of conference attendees. **AIMSE does not distribute attendee lists prior to the conference.**

DEADLINES

Early Bird Deadline: May 7, 2021

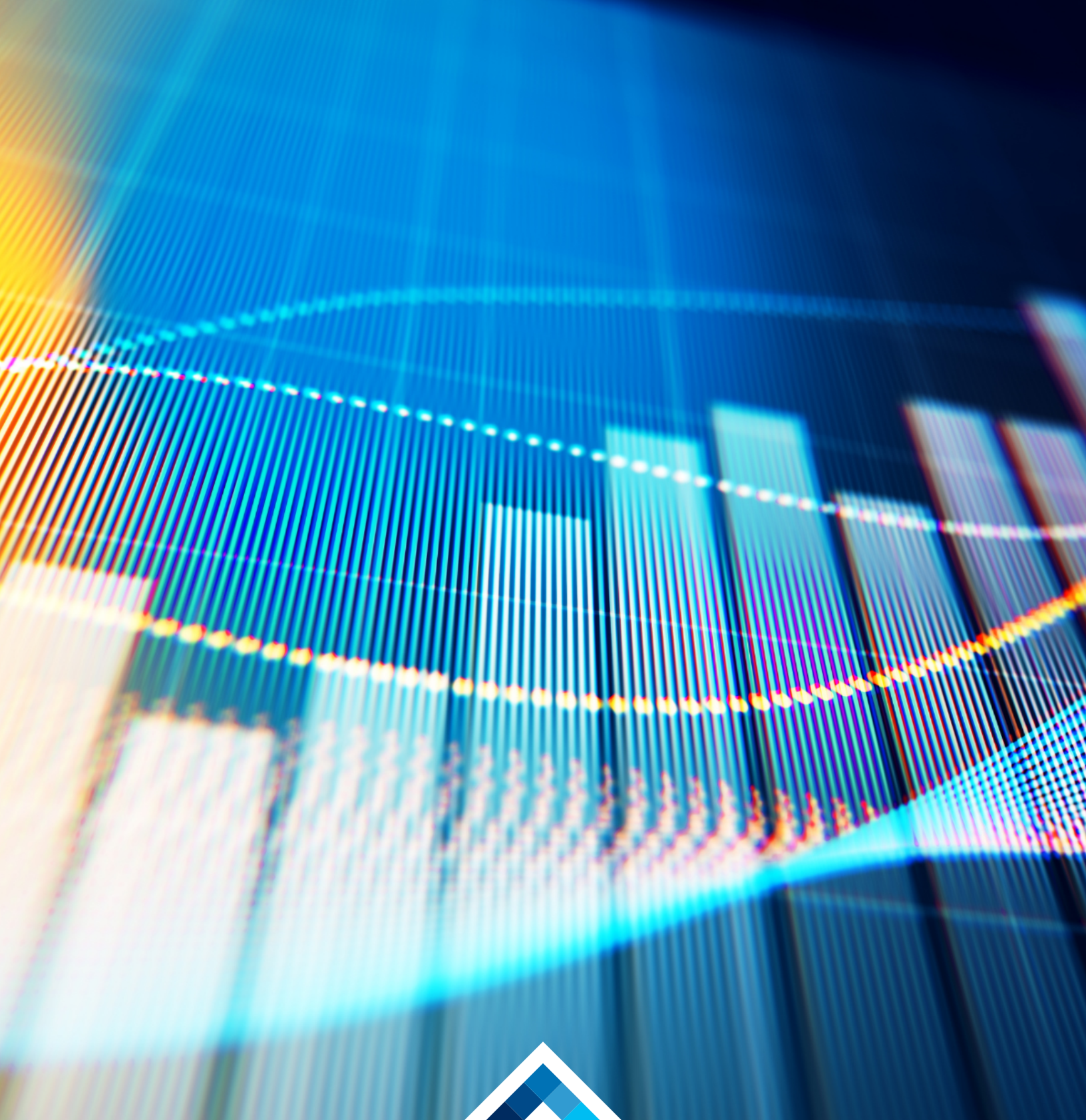
Cancellation Refund Request: May 7, 2021

For clarification on registration policies or to verify your membership status, call the AIMSE office at 703.234.4098 or send an e-mail to the AIMSE staff at info@aimse.org.

Thank you to our sponsors



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