

# GAIN THE EDGE

LISTEN. LEARN. RESONATE.

CONFERENCE PROGRAM

# AIMSE 39TH ANNUAL MARKETING & SALES CONFERENCE

May 1-3, 2016 | The Ritz-Carlton Orlando, Grande Lakes

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CE Qualified  
Activity



CFA Institute

As a participant in the CFA Institute Approved-Provider Program, AIMSE has determined that this program qualifies for 8 credit hour(s). If you are a CFA Institute member, credit for your participation in this program will be automatically recorded in your CE tracking tool.

## **DEAR AIMSE MEMBERS:**

Thank you for attending the 39th AIMSE Annual Marketing & Sales Conference. We are grateful for your attendance and your desire to learn and collaborate with peers and our industry's leading asset allocators.

The theme of this year's conference is **GAIN THE EDGE: LISTEN. LEARN. RESONATE**. Regardless of each AIMSE member's experience, education, work habits or prior successes, we can all improve. It's often the little things that ultimately help you "gain the edge" and separate you and your firm from the competition.

The agenda for the conference is packed with an impressive group of speakers and panelists, specifically chosen by the conference committee to represent all facets of the investment business. Below are a few of this year's highlights:

- Keynote sessions that are educational, motivational and entertaining. We are thrilled to have three nationally recognized speakers; Bob Beaudine to help you make the most of your network; Bill Acheson will enhance your body language and communication skills; and finally an ensemble from Second City will teach us when to say "yes, and."
- Featured consultant presentations from the CEOs of both The Bogdahn Group and Verus.
- Seven breakout sessions and the ever popular Boot Camp – all designed to provide in-depth knowledge and useful insight on specific, industry topics.
- Consultant roundtables modified to allow more time with each representative. We are fortunate to have a wonderful mix of national and regional firms, as well as, experts in traditional, alternative and private equity investments.

In addition, we have partnered with a variety of vendors who have built successful, forward-thinking businesses to meet the current and future needs of our membership. Please take the time to meet them and hear more about their products and services while at the conference.

The comradery and learning doesn't end with the sessions. The conference has ample time to interact and socialize with all the attendees. Make sure to catch up with old friends and make new ones. AIMSE members sharing knowledge and helping one another is the lifeblood that has helped this organization thrive and grow for nearly 40 years.

This year's conference committee has listened to your requests and worked hard to deliver a program that will help you gain the edge. If you are interested in becoming more involved in future AIMSE events or the organization as a whole, please seek out someone from the conference committee or the AIMSE Board of Directors.

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

Sincerely,

**Kurt Terrien**

Clarkston Capital Partners  
Conference Chair

**Matthew Crowe**

Proprietary Capital  
Conference Co-Chair

**LISTEN.LEARN.RESONATE.**

# BOARD OF DIRECTORS 2015-2016

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

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### **President**

Managing Director, Consultant Relations  
Jennison Associates  
466 Lexington Avenue  
New York, NY 10017  
Work: (212) 833-0305  
mhurd@jennison.com

## **Mr. Christopher D. Rae (6/1/10-5/31/16)**

### **Vice President**

Managing Director  
Elevation Marketing Advisory  
One Stamford Landing  
62 Southfield Avenue, Suite 202  
Stamford, CT 06902  
Work: (646) 468-1841  
chris.rae@elevationsecurities.com

## **Ms. Carolyn Patton, CFA (6/1/11-5/31/17)**

### **Treasurer**

Managing Director & Head of Consultant Relations, Americas  
Deutsche Asset Management  
345 Park Avenue, 25th Floor  
New York, NY 10154  
Work: (212) 454-2218  
carolyn.pattton@db.com

## **Mr. Scott J. Kearney (6/1/09-5/31/16)**

### **Emeritus President**

Head of Institutional Sales  
Delaware Investments  
2005 Market Street  
Philadelphia, PA 19103  
Work: (215) 255-8782  
scott.kearney@delinvest.com

## **Ms. Alejandra Arguello (6/1/13-5/31/16)**

Marketing and Investor Relations  
Caspian Capital LP  
767 Fifth Avenue, 45th Floor  
New York, NY 10153  
Work: (212) 826-7537  
Alejandra@caspianlp.com

## **Ms. Heather Conforto Beatty (6/1/14-6/1/17)**

Vice President, Institutional Team  
First Eagle Investment Management, LLC  
1345 Avenue of the Americas  
New York, NY 10105-4300  
Work: (212) 698-3170  
heather.beatty@feim.com

## **Mr. Matthew J. Crowe (6/1/11-5/31/17)**

Director, Marketing & Investor Relations  
Proprietary Capital, LLC  
2000 Ponce De Leon Boulevard, Suite 615  
Coral Gables, FL 33134  
Work: (303) 951-2513  
mcrowe@prop-cap.com

## **Mr. Brian Crowell, CFA (6/1/12-5/31/18)**

Global Head of Liquid Alternative Solutions  
Millennium Management LLC  
1700 East Putnam Avenue  
Old Greenwich, CT 06870  
Work: (203) 344-6350  
brian.crowell@mfp.com

## **Mr. Jack C. Ebenreiter, CFA (6/1/15-5/31/18)**

Vice President  
Federated Investors, Inc.  
1001 Liberty Avenue  
Pittsburgh, PA 15222-3714  
Work: (412) 288-8743  
jebenreiter@federatedinv.com

## **Mr. Paul D. Foster, CFA (6/1/11-5/31/17)**

Head of Consultant Relations  
The London Company  
1800 Bayberry Court, Ste 301  
Richmond, VA 23226  
Work: (804) 775-0317  
pfoster@tlcadvisory.com

## **Mr. David Gallagher (6/1/13-5/31/16)**

Global Sales and Investor Relations  
Granahan Investment Management  
404 Wyman Street, Suite 460  
Waltham, MA 02451  
Work: (781) 890-4412  
dgallagher@granahan.com

**Mr. Michael R. Gillis** (6/1/14-6/1/17)  
Senior Vice President, Business Development  
Greystone Managed Investments, Inc.  
Canada Trust Tower, BCE Place  
161 Bay Street, Suite 4530  
Toronto, ON M5J 2S1  
CANADA  
Work: (416) 309-2190  
[michael.gillis@greystone.ca](mailto:michael.gillis@greystone.ca)

**Mr. Timothy P. Hill** (6/1/13-5/31/16)  
Cell: (917) 428-2977  
[Timhill92@yahoo.com](mailto:Timhill92@yahoo.com)

**Mr. John P. Mirante, CFA, CPA** (6/1/15-5/31/18)  
Senior Relationship Manager  
BMO Global Asset Management  
115 S. LaSalle Street, 11th Floor  
Chicago, IL 60603  
Work: (312) 952-8933  
[john.mirante@bmo.com](mailto:john.mirante@bmo.com)

**Mr. Christopher Paolella** (6/1/13-5/31/16)  
Managing Partner  
Liquid Strategies, LLC  
6 Concourse Parkway, Suite 3300  
Atlanta, GA 30328  
Work: (770) 350-8709  
[cpaolella@lsfunds.com](mailto:cpaolella@lsfunds.com)

**Mr. Mark Robertson** (6/1/12-5/31/18)  
Director of Business Development  
Proprietary Capital, LLC  
1225 17th Street, Suite 1500  
Denver, CO 80202  
Work: (303) 951-2515  
[mrobertson@prop-cap.com](mailto:mrobertson@prop-cap.com)

**Ms. Christine Sasse, CFA** (6/1/14-5/31/17)  
Director, Consultant Relations  
Epoch Investment Partners, Inc  
399 Park Avenue, 31st Floor  
New York, NY 10022  
Work: (646) 676-4028  
[csasse@eipny.com](mailto:csasse@eipny.com)

**Ms. Miriam Tai, CFA, CAIA** (6/1/15-5/31/18)  
Managing Director, Business Development  
CIFC Asset Management  
250 Park Avenue, 4th Floor  
New York, NY 10177  
Work: (212) 624-4539  
[mtai@cifc.com](mailto:mtai@cifc.com)

**Mr. Kurt Terrien** (6/1/14-5/31/17)  
Director of Institutional Business  
Clarkston Capital Partners  
91 West Long Lake Road  
Bloomfield Hills, MI 48304  
Work: (248) 723-8000  
[kpt@clarkstoncapital.com](mailto:kpt@clarkstoncapital.com)

**Ms. Holly K. Verdeyen** (6/1/12-5/31/18)  
Director, Defined Contribution Investments  
Russell Investments  
71 S Wacker Drive, Suite 2040  
Chicago, IL 60606  
Work: (312) 780-7100  
[hverdeyen@russell.com](mailto:hverdeyen@russell.com)

**Mr. Gregory Weissman** (6/1/12-5/31/18)  
Director, Consultant Relations  
Putnam Investments  
One Post Office Square  
Boston, MA 02109  
Work: (617) 760-3222  
[gregory\\_weissman@putnam.com](mailto:gregory_weissman@putnam.com)

**Ms. Kimberley A. Woolverton, CFA**  
(6/1/11-5/31/17)  
Senior Business Development Manager  
Aberdeen Asset Management  
161 Bay Street, 44th Floor  
TD Canada Trust Tower  
Toronto, ON M5J 2S1  
CANADA  
Work: (416) 777-5572  
[kimberley.woolverton@aberdeen-asset.com](mailto:kimberley.woolverton@aberdeen-asset.com)

# COMMITTEE CHAIRS 2015-2016

## ALTERNATIVES COMMITTEE

**Christopher Rae**  
Chair  
Elevation Marketing Advisory

**Alejandra Argüello**  
Co-Chair  
Caspian Capital LP

**Mark Robertson**  
Co-Chair  
Proprietary Capital

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Clarkston Capital Partners

**Matthew Crowe**  
Co-Chair  
Proprietary Capital

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**P. MacKenzie Hurd, CFA**  
Chair  
Jennison Associates

## CANADIAN COMMITTEE

**Kimberley Woolverton, CFA**  
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Aberdeen Asset Management

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**Mark Robertson**  
Chair  
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Co-Chair  
Millennium Management LLC

**Paul Foster, CFA**  
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The London Company

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Chair  
Granahan Investment Management

**Christine Sasse, CFA**  
Co-Chair  
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**Miriam Tai, CFA, CAIA**  
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**Holly Verdeyen**  
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Russell Investments

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**P. MacKenzie Hurd, CFA**  
Chair  
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Co-Chair  
Greystone Managed Investments, Inc.

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**Matthew Crowe**  
Chair  
Proprietary Capital

**Christopher Paoella**  
Co-Chair  
Liquid Strategies, LLC

# REGIONAL EVENT CHAPTER CONTACTS

## ATLANTA

**Greg Bauer**  
gbauer@paraport.com

## BOSTON

**Gregory Weissman**  
gregory\_weissman@putnam.com

## CALIFORNIA

**Heather Conforto Beatty**  
heather.beatty@feim.com

## CHICAGO

**John Mirante**  
john.mirante@bmo.com

## DENVER

**Kristin Fenik**  
kfenik@ap-am.com

## NEW YORK

**Alejandra Argüello**  
alejandra@caspianlp.com

## PHILADELPHIA

**John Larson**  
jlarson@hgk.com

## Jack Ebenreiter

jebenreiter@federatedinv.com

## PORTLAND

**Rodrigo Soto**  
rsoto@eatonvance.com

## Heather Conforto Beatty

heather.beatty@feim.com

## SEATTLE

**Rodrigo Soto**  
rsoto@eatonvance.com

## Heather Conforto Beatty

heather.beatty@feim.com

## ST. LOUIS

**Gus Catsavis**  
gcatsavis@pinnacle-lp.com

## TEXAS

**Mark Robertson**  
mrobertson@prop-cap.com

## Matt Pawlak

matt.pawlak@dimensional.com

## TORONTO & MONTREAL

**Jay Wiltshire**  
jay.wiltshire@greystone.ca

## AIMSE MOBILE APP

POWERED BY CROWDCOMPASS

Features of the app include:

- The full conference schedule sorted by day and/or speaker
- The ability to rate the sessions directly on the app
- Connect and exchange contact details with other attendees
- Find session and exhibitor locations with maps of exhibit halls and session rooms
- See details about all of the exhibitors and sponsors
- Catch notifications about networking opportunities, contests, and other breaking event news pushed directly to your device

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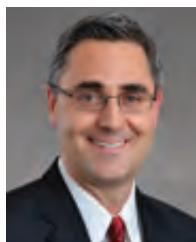
# FEATURED SPEAKER HIGHLIGHTS

## MONDAY, MAY 2



8:15-9:15 am

Keynote Presentation  
by Bob Beaudine  
*The Power of Who*



9:50-10:35 am

Featured Consultant:  
The Bogdahn Group  
  
Mike Welker, CFA  
President & Chief  
Executive Officer



1:10-2:10 pm

Keynote Presentation  
by Bill Acheson  
  
Buying Signs: A New  
'Look' at Selling

## TUESDAY, MAY 3



8:00-9:20 am

Keynote Presentation  
by The Second City  
Works  
  
Yes, And for Sales



9:45-10:30 am

Featured Consultant:  
Verus Investments  
  
Jeff MacLean  
Chief Executive Officer

LISTEN.LEARN.RESONATE.

# SCHEUDLE AT A GLANCE

## SUNDAY, MAY 1

7:00-8:00 am	Golf Tournament Registration & Breakfast Fairways Restaurant, The Ritz-Carlton Golf Club
8:00 am-12:00 pm	Golf Tournament The Ritz-Carlton Golf Club
10:00-11:30 am	Golf Clinic The Ritz-Carlton Golf Club
12:00-1:30 pm	Luncheon for Golf Tournament and Clinic Participants Fairways Restaurant, The Ritz-Carlton Golf Club
2:30-5:30 pm	Boot Camp Siena Room
4:00-8:00 pm	Conference Registration Plaza Ballroom Foyer
6:00-6:30 pm	Newcomer & Mentor Reception Citrus Garden
6:30-9:30 pm	Welcome & Exhibitor Reception Ritz-Carlton Ballroom 4-6

## MONDAY, MAY 2

7:00 am- 3:30 pm	Conference Registration Plaza Ballroom Foyer
7:00-8:00 am	Breakfast with Exhibitors Ritz-Carlton Ballroom 4-6
8:00-8:15 am	AIMSE President's Welcome Plaza Ballroom
8:15-9:15 am	Keynote Presentation by Bob Beaudine, <i>The Power of Who</i> Plaza Ballroom
9:15-9:35 am	Refreshment Break with Exhibitors Ritz-Carlton Ballroom 4-6
9:40-9:50 am	A Word from our Partners Plaza Ballroom
9:50-10:35 am	Featured Consultant: The Bogdahn Group Mike Welker, CFA, President & Chief Executive Officer Plaza Ballroom

<b>10:45-11:40 am</b>	Concurrent Breakout Sessions  Session 1: Outsourced CIO 2.0: New Trends Advancing the March in Delegated Consulting Services <a href="#">Plaza Ballroom</a>
	Session 2: Hospital and Healthcare Investing – Navigating Within the Industry <a href="#">Siena Room</a>
	Session 3: Gaining the Edge in the Sub-Advisory Marketplace <a href="#">Amalfi Room</a>
<b>11:45 am-1:00 pm</b>	Networking Lunch with Exhibitors & Presentation by Rivel Research Group <a href="#">Ritz-Carlton Ballroom 4-6</a>
<b>1:00-1:10 pm</b>	A Word from our Partners <a href="#">Plaza Ballroom</a>
<b>1:10-2:10 pm</b>	Keynote Presentation by Bill Acheson Buying Signs: A New 'Look' at Selling <a href="#">Plaza Ballroom</a>
<b>2:10-2:30 pm</b>	Refreshment Break with Exhibitors <a href="#">Ritz-Carlton Ballroom 4-6</a>
<b>2:30-3:25 pm</b>	Concurrent Breakout Sessions  Session 4: Are You Insurance Fluent? <a href="#">Amalfi Room</a>
	Session 5: Managing Institutional Alternative Investment Portfolios <a href="#">Siena Room</a>
<b>4:30-6:45 pm</b>	Optional Outdoor Activities – Tennis Tournament, <a href="#">Tennis Courts</a> – Volleyball Tournament, <a href="#">Volleyball Courts</a>
<b>7:30-8:00 pm</b>	Cocktail Reception <a href="#">Da Vinci Lawn &amp; Terrace</a>
<b>8:00-11:00 pm</b>	Dinner & AIMSE Lothrop Award Presentation <a href="#">Plaza Ballroom</a>

**LISTEN.LEARN.RESONATE.**

## TUESDAY, MAY 3

7:00 am – 1:30 pm	Conference Registration Plaza Ballroom Foyer
7:00-8:00 am	Breakfast with Exhibitors & AIMSE Annual Business Meeting <a href="#">Ritz-Carlton Ballroom 4-6</a>
8:00-9:20 am	Keynote Presentation by Second City Works: Yes, And for Sales Plaza Ballroom
9:20-9:40 am	Refreshment Break with Exhibitors <a href="#">Ritz-Carlton Ballroom 4-6</a>
9:45-10:30 am	Featured Consultant: Verus Investments Jeff MacLean, Chief Executive Officer Plaza Ballroom
10:35-11:25 am	Concurrent Breakout Sessions  Session 6: Women in Investing – A View from the Other Half <a href="#">Amalfi Room</a>  Session 7: ESG Investing: Understanding the Motivations and Needs of ESG Investors <a href="#">Siena Room</a>
11:30 am-1:30 pm	Consultant Roundtables Plaza Ballroom
1:30-2:30 pm	Networking Lunch with Exhibitors <a href="#">Ritz-Carlton Ballroom 4-6</a>
2:30 pm	Conference Adjourns

*Program is subject to change.  
Visit <http://www.aimse.org> for updates.*

# 92%

Percentage of plan sponsors who believe  
**investor communications and support** are  
integral to an asset manager's mission

## Now ask yourself, "Do I know for a fact ...

*(Check all that apply)*

- Our clients and consultants see us as adhering to industry best practices, on all levels?"
- What our clients and prospects say to us is exactly the way they talk about us?"
- My investors view our peers to be the same firms that we deem our peers to be?"
- There's absolutely nothing more we can learn from our stakeholders that will allow us to more effectively retain and grow AUM?"

*Any boxes left unchecked? Rivel Research Group can help.*

## ASSET MANAGER PERCEPTION RESEARCH

### Rivel's perception research uncovers:

- The **specific drivers** behind your target market's asset allocation decisions.
- What has been successful in your **attracting and retaining clients**, or why investors ultimately chose your competitor.
- Clients' **current level of trust** in your firm and what areas can be improved.
- 100% unvarnished feedback** allowing you to gain that edge over your competitors.



For over 25 years, Rivel Research Group has been gathering, analyzing and interpreting institutional investor feedback. In fact, our founder Art Rivel invented the investor perception study nearly 40 years ago. Through our proprietary method of quantifying anecdotal survey responses, we provide asset managers with a laser-precision strategic marketing tool that will be the cornerstone for any communication strategy. For more information, contact Alon Kutai, Senior Managing Director of Rivel's Asset Management Division at 203.987.5747 or [akutai@rivel.com](mailto:akutai@rivel.com). Visit [www.rivel.com](http://www.rivel.com) for a closer look at Rivel.

# EXTENDED SCHEDULE

## SUNDAY, MAY 1

**7:00-8:00 am**

**Golf Tournament Registration & Breakfast**

Fairways Restaurant, The Ritz-Carlton Golf Club

**8:00 am-12:00 pm**

**Golf Tournament**

The Ritz-Carlton Golf Club

**10:00-11:30 am**

**Golf Clinic**

The Ritz-Carlton Golf Club

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

**12:00-1:30 pm**

**Luncheon for Golf Tournament and Clinic Participants**

Fairways Restaurant, The Ritz-Carlton Golf Club

**2:30-5:30 pm**

**Boot Camp**

Siena Room

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

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

**Moderators:** Michael Gillis

Senior Vice President, Business Development  
Greystone Managed Investments, Inc.

Chris Rae

Founder & Managing Director  
Elevation Marketing Advisory

**4:00-8:00 pm**

**Conference Registration**

Plaza Ballroom Foyer

**6:00-6:30 pm**

**Newcomer & Mentor Reception**

Citrus Garden

**6:30-9:30 pm**

**Welcome & Exhibitor Reception**

Ritz-Carlton Ballroom 4-6

## MONDAY, MAY 2

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

**Conference Registration**

Plaza Ballroom Foyer

**7:00-8:00 am**

**Breakfast with Exhibitors**

Ritz-Carlton Ballroom 4-6

**8:00-8:15 am**

**AIMSE President's Welcome**

Plaza Ballroom

**8:15-9:15 am**

**Keynote Presentation by Bob Beaudine, *The Power of Who***

Plaza Ballroom

What if each us had specific people placed in our lives to help us in ways we never imagined? What if these people weren't just happenstance acquaintances but were strategically given to us? What if changing our company's culture, improving our production, or getting that next big piece of business wasn't about who we don't know, but rather who we're overlooking? In what some have called the "biggest, simplest idea to ever hit the scene," CEO and author Bob Beaudine's Power of WHO! presentations reveal profound truth hiding in plain sight through perspective change, storytelling, and his unique high-energy speaking style.

**9:15-9:35 am**

**Refreshment Break with Exhibitors**

Ritz-Carlton Ballroom 4-6

**9:40-9:50 am**

**A Word from our Partners**

Plaza Ballroom

**LIS TEN. LEARN. RESONATE.**

**9:50-10:35 am**

**Featured Consultant: The Bogdahn Group**

Mike Welker, CFA, President & Chief Executive Officer

**Plaza Ballroom**

The Bogdahn Group is an independent, employee owned investment consulting firm that advises over 450 institutional clients with approximately \$60 billion of assets nationwide. The firm's mission is to represent the sole interest of their clients by redefining independence. The firm seeks to transform the investment consulting industry by demonstrating the value of putting the client's interests above all others, serving with care and a level of stewardship that only true independence can provide. The Bogdahn Group provides investment consulting services for defined benefit, defined contribution, deferred compensation, non-qualified, other post-employment benefits (OPEB) and voluntary employee beneficiary association (VEBA) benefit plans as well as endowments and foundations.

**10:45-11:40 am**

**Concurrent Breakout Sessions**

**Session 1: Outsourced CIO 2.0: New Trends Advancing**

**the March in Delegated Consulting Services**

**Plaza Ballroom**

"Outsourcing" and "Delegated Consulting" take on new meaning in a paradigm shift for an industry that has witnessed staggering growth over the last 7 years. According to the 2015 Chief Investment Officer OCIO Buyer's Guide, total assets under discretionary management has grown by 797% from 2007 – 2014. How will this industry continue to evolve? Growth in assets reflects competition and this industry will be driven to change as greater capabilities are demanded. We will examine the trends in "up-market" as larger institutions outpace smaller ones, seeking additional resources and more comprehensive services. Many institutions employing an OCIO today have been delegating discretion for 5, 10 or more years. These early adopters are re-evaluating their relationships, measuring performance, and seeking more customized services often for a better price. We'll hear from a panel of experts and leaders in this space as they navigate these new trends and tailor their OCIO business models to investor demands.

**Moderator: Kerra M. Smith**

Managing Director, Investor Relations  
Forester Capital L.L.C.

**Speakers: Margaret Chen**

Managing Director and Head, CA Capital Management  
Cambridge Associates

**Jim Dunn**

Chief Executive Officer, Chief Investment Officer  
Verger Capital Management, LLC

**Travis Pruitt, CFA**

Principal, US Delegated Endowment/Foundation Leader  
Mercer Investments

**Session 2: Hospital and Healthcare Investing –  
Navigating Within the Industry**  
**Siena Room**

The typical healthcare system, has a defined pension plan, long-term asset pools, a professional liability pool and a foundation or endowment. And while they require different investment strategies, they're all interdependent. Typically they jointly affect a system's credit rating and days of cash on hand. In the healthcare space in particular, most hospitals don't employ an investment staff like you might see at a large university. There's a limit on how much day-to-day attention they can put on the investments. What can we learn from our guests as to best assist them navigate the vast investment management array of services investment as they are seeking to manage market volatility while customizing an investment approach for each asset pool.

**Moderator: Gus Catsavis, CFA**

Managing Director  
Pinnacle Asset Management, L.P.

**Speakers:** **Scott Graham, CFA**  
Chief Investment Officer  
Highland Associates

**Elizabeth Jourdan**  
Deputy Chief Investment Officer  
Mercy

**Robert Kowalski**  
Director of Investments  
Beaumont Health

**Session 3: Gaining the Edge in the Sub-Advisory Marketplace**  
**Amalfi Room**

Strategic planning of your marketing and business development efforts is essential for you and your firm to achieve success and attract assets. This session is designed to help you do just that. Were you aware that total sub-advised assets have surpassed \$2.4 trillion between mutual fund and variable annuity assets? According to Strategic Insights, since 2010 there has been over \$200 billion in net flows, and over 1000 new sub-advised funds. Thus, the questions are: Who is "winning"? Are there undiscovered manager programs for smaller firms to get a piece of the pie? How can your firm gain an edge in a competitive marketplace? What considerations need to be given to distribution/sales support? What role do consultants play in

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the process? What are the characteristics of a successful sub-advisory firm? Three major sub-advisory allocators will explore these issues in this interactive session – join us!

**Moderators:** Kevin A. Joy

Director  
Weitz Investment Management

**Mark Sullivan**

Director, Institutional Sales & Relationship Management  
Stralem & Company

**Speakers:** Rick T. Babich, CFA

Vice President, Head of Manager Research,  
Strategic Investment Research Group  
Prudential Investments, LLC

**Jeffrey K. Ringdahl**

Chief Operating Officer  
American Beacon Advisors

**Christopher E. Vella, CFA**

Chief Investment Officer  
Multi-Manager Investments  
Northern Trust Investments

**11:45 am-1:00 pm**

**Networking Lunch with Exhibitors & Presentation**

**by Rivel Research Group**

**Ritz-Carlton Ballroom 4-6**

**Moderator:** Chris Rae

Founder & Managing Director  
Elevation Marketing Advisory

**Speaker:** Alon Kutai

Senior Managing Director, Asset Management Division  
Rivel Research Group

**1:00-1:10 pm**

**A Word from our Partners**

**Plaza Ballroom**

**1:10-2:10 pm**

**Keynote Presentation by Bill Acheson**

**Buying Signs: A New 'Look' at Selling**

**Plaza Ballroom**

Body language accounts for more than two thirds of the impact you make on your prospects and clients in face-to-face communication. In making a first impression, it is ten times more powerful than what you say.

Learn ways to enhance your own body language signals as well as how to understand some of the hidden messages sent by your prospects. Small changes in your behavior can yield big results!

In this presentation Bill profiles rapport and personal power in detail. Learn how your use of time, space, appearance, posture, gesture, facial expression, eye contact, voice, touch, and even smell impact your ability to sell.

The presentation style is educomedy; a mixture of academic research and humor designed to both motivate and educate.

**2:10-2:30 pm**

#### **Refreshment Break with Exhibitors**

Ritz-Carlton Ballroom 4-6

**2:30-3:25 pm**

#### **Concurrent Breakout Sessions**

##### **Session 4: Are You Insurance Fluent?**

Amalfi Room

The insurance market differs from other institutional markets and is currently facing increased regulation requiring more specific investment needs. According to the 2015 GSAM Insurance Asset Management Survey, insurers believe their industry is either adequately or over-capitalized but that investment opportunities are deteriorating. They have become more concerned about deflation due to slower global growth and are looking to less liquid, private asset classes to augment returns. This panel will tap into leaders in the insurance industry to provide insight into trends in asset flows and guidance on the most effective way to work with this segment of the market today.

**Moderator:** Luke Schlafly, CFA

Vice President, Institutional Business Development  
Deutsche Asset Management

**Speakers:** Kenneth B. Beitler, CFA

Investment Specialist, Investment Strategies & Solutions  
MetLife

E. Connell Hasten

Director of Investments

EquiTrust Life Insurance Company

John Patin

Senior Vice President, Investment Group  
AWAC Services Company, Inc.

Marc A. Tourville, CFA, CIPM

Managing Director

Cardinal Investment Advisors

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## **Session 5: Managing Institutional Alternative Investment Portfolios**

**Siena Room**

Alternative investments have played a prominent role in institutional investment portfolios for some time. The approaches and philosophies on why and how to allocate to these assets vary as does the understanding of the benefits they deliver to the whole portfolio. The complexity of the investment strategies and their fund structures, as well as their high fees, pose obstacles to taking advantage of these assets in portfolios. This panel of prominent CIOs and consultants will discuss the role that alternatives play in their portfolios, how they manage them, and how they see the role alternatives play in portfolios going forward.

**Moderator:** Mark Robertson

Director of Business Development  
Proprietary Capital

**Speakers:** Eric Freedman

Chief Investment Officer  
CAPTRUST Financial Advisors

Lauren Garner

Director, Asset Management  
Perella Weinberg Partners

Andrew Yongvanich

Director  
UBS

**4:30-6:45 pm**

### **Optional Outdoor Activities**

- Tennis Tournament, Tennis Courts
- Volleyball Tournament, Volleyball Courts

**7:30-8:00 pm**

### **Cocktail Reception**

**Da Vinci Lawn and Terrace**

**8:00-11:00 pm**

### **Dinner & AIMSE Lothrop Award Presentation**

**Plaza Ballroom**

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

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

### **Lothrop Award Winners**

James Manley, Manley & Associates  
John Sieter, Capital Guardian Trust  
Sharon Hough, Pequot Capital  
Michael Fisher, Barclays Global  
Victor Zollo, De Prince, Race & Zollo  
Dick Graf  
Jerry Devore  
Frank Minard, XT Capital Partners  
Eugene Waldron  
James Wood  
Obie McKenzie, Blackrock  
John "Rick" Rockwell, T. Rowe Price  
Marlis S. Fritz  
Dick Hoag, Landmark Global Advisors, LLC  
Neal Howe, Barclays Funds & Advisory  
Tim McAvoy, DePrince, Race & Zollo, Inc.

## **TUESDAY, MAY 3**

**7:00 am-1:30 pm**

**Conference Registration**

Plaza Ballroom Foyer

**7:00-8:00 am**

**Breakfast with Exhibitors & AIMSE Annual Business Meeting**

Ritz-Carlton Ballroom 4-6

**8:00-9:20 am**

**Keynote Presentation by Second City Works:**

***Yes, And for Sales***

Plaza Ballroom

How improvisation reverses "no, but" thinking, and improves sales and collaboration.

Join the team at Second City Works, the innovative B2B solutions arm of the world famous Second City comedy theatre, in an interactive session designed to give anyone at AIMSE an experiential introduction to the "Yes, And..." philosophy of improvisation and its connection to sales enablement. You'll walk away with valuable tips and tricks on how to build better teams, communicate more effectively, and lead more collaboratively -- all in a fun-filled environment with lots of laughs. Join us!

**9:20-9:40 am**

**Refreshment Break with Exhibitors**

Ritz-Carlton Ballroom 4-6

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**9:45-10:30 am**

**Featured Consultant: Verus Investments**

**Jeff MacLean, Chief Executive Officer**

**Plaza Ballroom**

The Latin verus, meaning truth, reflects our commitment to values like clarity, integrity, trust and independence.

Since 1986, Verus has been helping institutions achieve their enterprise objectives with a combination of unbiased research, customized advice, and top-rated client service. Today we advise on over \$100 billion in client assets, through non-discretionary consulting and discretionary OCIO services, for a wide range of clients including educational and charitable organizations, corporate, multi-employer and public defined benefit plans, hospitals and insurance providers.

**10:35-11:25 am**

**Concurrent Breakout Sessions**

**Session 6: Women in Investing – A View from the Other Half**

**Amalfi Room**

Gain an edge with a rare opportunity to hear a variety of perspectives on the future of institutional investing from an all-women panel of investment decision-makers. A number of studies have revealed important differences between male and female decision-makers and investors, but women constitute a small subset of the institutional investment industry. Although women constitute over 50% of college graduates in the United States, female investment managers represent less than 10% of the industry. In alternative asset classes, women represent only 6% in private equity, 4% in real estate and 3% in hedge funds, by some estimates. What do some of the top women in our industry see in the future for institutional investing? Are women investors better or different? Can we improve investment outcomes for our clients by encouraging more women to become investors? Increase your edge by learning about mistakes that men and women make in presenting and working with women investors.

**Moderator: Tammira Philippe, CFA**

President & Director

Bridgeway Capital Management

**Speakers:** Deborah S. Christie, CFA

Managing Director

Cambridge Associates

Kathleen Powers Dunlap

Chief Executive Officer

Girls Who Invest, Inc.

**Geraldine Jimenez, CFA**  
Portfolio Manager - Engagement  
California State Teachers' Retirement System

**Nikki Kraus, CFA**  
Global Head of Client Development  
Strategic Investment Group

**Session 7: ESG Investing: Understanding the Motivations  
and Needs of ESG Investors**  
**Siena Room**

Interest in Environmental, Social, and Governance (ESG) investing has grown significantly in recent years. There is increasing evidence that there is value in values, that information gathered from the analysis of ESG considerations can have a material impact on the risk and return of an investment portfolio. The manner in which investors choose to implement these considerations is largely influenced by the organization's motivation for incorporating values. In this panel discussion, we will explore the differing motivations for incorporating values, and the resulting solutions that are demanded from investment managers.

**Moderator:** Kristin M. Reynolds, CFA, CAIA  
Partner  
NEPC, LLC

**Speakers:** Craig Metrick, CAIA  
Director of Manager Due Diligence & Thematic Research  
Cornerstone Capital Group

Bryan J. Pini, CFA  
President & Chief Investment Officer  
Mercy Investment Services

**11:30 am-1:30 pm**

**Consultant Roundtables**

**Plaza Ballroom**

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

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**Moderators:** John Larson  
Director  
HGK Asset Management

**Miriam Tai, CFA, CAIA**  
Managing Director, Business Development  
CIFC Asset Management

**Speakers:** Thomas Deegan  
Managing Director  
Clearbrook Global Advisors

Kristen Doyle, CFA  
Partner, Head of Public Pension Funds  
Aon Hewitt Investment Consulting

Brian Falco  
Senior Vice President, Principal  
LCG Associates

Roger Fenningdorf  
Head of Global Manager Research  
Rocaton Investment Advisors

Jeffrey D. Furst, CFA, CAIA  
Vice President, Hedged Strategies  
Fund Evaluation Group

Roderick Hennek  
Managing Director & Founder  
Atlanta Consulting Group

David Hyman, CFA  
Senior Consultant  
Mercer

Aarish Patell, CAIA  
Research Consultant, Private Markets  
NEPC, LLC

Mark Stahl, CFA  
Senior Vice President, Global Manager Research  
Callan Associates Inc.

**1:30-2:30 pm**

**Networking Lunch with Exhibitors**

Ritz-Carlton Ballroom 4-6

**2:30 pm**

**Conference Adjourns**

# CONFERENCE CHAIRS



## KURT TERRIEN

Chair

Director of Institutional Business  
Clarkston Capital Partners

Kurt joined Clarkston Capital Partners in 2013 and oversees the firm's institutional business, including sales, consultant relations and client service. Kurt has over 20 years of industry experience. Most recently, he was the Director of Sales and Consultant Relations for Johnson Institutional Management. Prior to that, he was Vice President of Institutional Asset Management at National City Bank and a Senior Client Services Manager at World Asset Management.

Kurt received a Bachelor's degree in Finance from Walsh College and a MBA from Wayne State University. He is a member of MAPERS (Michigan Association of Public Employees Retirement Systems) and serves on the board of AIMSE.



## MATTHEW CROWE

Co-Chair

Director, Marketing & Investor Relationships  
Proprietary Capital

Matthew J. Crowe is the Director of Marketing & Investor Relations for Proprietary Capital, LLC. Mr. Crowe is responsible for managing the firms marketing and investor relations efforts. Prior to joining Proprietary, Mr. Crowe was a Principal of Anchor Point Capital, LLC, a Coral Gables, FL-based fund-of-hedge fund. Prior to Anchor Point, Mr. Crowe worked on the U.S.-based sales & client services team at Fjord Seafood ASA, a leading global commodity company specializing in the production of farmed salmon. Mr. Crowe started his career working in the publishing industry. Mr. Crowe received his BA in business administration from Western State College of Colorado.

Proprietary Capital, LLC, a Denver, CO-based investment management company that was founded in 1997 and specializes in the Residential Mortgage Backed Securities (RMBS) market.

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# MODERATORS & SPEAKERS, & CONFERENCE COMMITTEE



## BILL ACHESON

Bill Acheson is an expert in nonverbal communication. As a faculty member of the Department of Communication at the University of Pittsburgh for over 20 years and as a professional speaker since 1994, Bill has spoken to thousands of people across the United States about how to use body language to communicate more effectively.

From the classroom to the courtroom to the conference room, Bill has worked with professionals who want to improve their bottom-line performance.

Find out what employees from American Century, Bank of America, Deutsche Asset & Wealth Management, Ernst & Young, Glaxo SmithKline, Ivy Funds, John Hancock, Legg Mason, Merrill Lynch, Met Life, MorganStanley, Nationwide, Prudential, SunAmerica, Transamerica, UBS, Wells Fargo, the United States Coast Guard, and the U.S. Army have already discovered. It's not just what you say; it's how you say it.



## RICK T. BABICH, CFA

Vice President, Head of Manager Research,  
Strategic Investment Research Group  
Prudential Investments, LLC

Mr. Babich serves as the Head of Manager Research for Strategic Investment Research Group, responsible for the overall research effort and managing the research analysts.

Prior to joining Prudential, Mr. Babich was a Director of Research for Parker Global Strategies, an alternative investment firm specializing in fund of fund solutions for insurance companies, pensions, endowments and high net worth individuals, where he served on their Investment and Executive committees. Prior, he was a research analyst at Commerzbank in the Alternative Investment Strategies group from 2004 until 2008, responsible for sourcing managers, performing due diligence, and monitoring the investment portfolio. Prior to joining Commerzbank, Mr. Babich worked in various roles at Morgan Stanley between 2000 and 2004, first as the Manager of Structured Product Control in the Institutional Equity Division, next as the Senior Manager of OTC Production, and finally as Senior Manager of Valuation Risk Control. Mr. Babich was an Associate of Middle Office Proprietary Trading at JP Morgan & Co from 1996 through 2000. He began his career in finance as a Trader Assistant at the Caxton Corporation in 1994. Mr. Babich is a Board of Director for CenterLight Health System, a non-profit organization dedicated to quality of life in the New York metropolitan area. He is the Chair of their Investment Committee and a member of the Finance Committee.

Mr. Babich has a B.S. from Rutgers University in Environmental and Business Economics. He received his MBA from Fordham University in 2002 with a concentration in Finance.

\*Indicates 2016 AIMSE Annual Conference Committee Member



## HEATHER CONFORTO BEATTY\*

Vice President, Institutional Team  
First Eagle Investment Management, LLC

Heather is a vice president on the Institutional team at First Eagle Investment Management, and is responsible for managing relationships with institutions and consultants primarily in the Midwest and on the West Coast. Prior to joining First Eagle in March 2016, she was a senior vice president at TCW and, before that, co-director of global consultant relations for Thornburg Investment Management. At both firms, she focused on managing and cultivating consultant and institutional relationships. Heather began her career in investment management at Palisades Investment Partners, where she drove all efforts related to institutional business development, client service and marketing. She is a graduate of Miami University of Ohio and holds her Series 7 and Series 66 licenses. Heather is involved in several national and regional organizations. She is a co-founder of Women in Institutional Investments Network (WIIIN), a Los Angeles-based 501c3, and a board member at the Association of Investment Management Sales Executives (AIMSE).



## BOB BEAUDINE

Chief Executive Officer  
Eastman & Beaudine

Bob Beaudine is the President and CEO of Eastman & Beaudine and serves as the firm's lead principal for all sports and entertainment searches. Under Bob's leadership, Eastman & Beaudine blossomed into the nation's leading executive search firm in professional sports and entertainment. *The Wall Street Journal* named Eastman & Beaudine the "top recruiting firm in college sports," and *Sports Illustrated* named Bob the "top front-office matchmaker in sports" as well as the "most influential man in sports you've never heard of." These accolades come as a result of Bob helping to shape the leadership teams of NBA, MLB, NFL, and NHL franchises and league offices, in addition to university athletic departments across the nation. Bob's experience also extends to the PGA Tour, USTA, Arena Football, PBR, U.S. Olympics, NASCAR, and UFC, among others. Bob was named one of North America's Top Executive Recruiters in *The New Career Makers*, and Eastman & Beaudine was honored as a member of the elite "Top 50" executive search firms by the industry's *Executive Recruiter News*.

Bob is also the bestselling author of *The Power of WHO!* and a frequent speaker at universities, corporations, conventions, conferences, and workshops. He recently spoke at the Texas Conference for Women at the invitation of First Lady Anita Perry as well as the Sports Business Journal Motorsports Marketing Forum, and has spoken at Nike, Advocare, Cessna, MSG Sports, Learfield, and dozens of other major corporations. Bob regularly speaks at the Division I-A Athletic Director Institute, NACDA, NACWAA, the American Football Coaches Association, and the Black Coaches Association, among many others. Furthermore, Bob has brought his *WHOUniversity* program to over 20 colleges and universities across the country. He has appeared on *The Today Show*, Fox Business Network, Canada's Business News Network, ABC Good Morning Texas, Fox Good Day, CBN News, and often appears on CNBC as an expert on intercollegiate athletics.

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Bob's leadership also extends into the community. Bob is on the Board of Directors of the two-time American League Champion Texas Rangers as well as the Advisory Board of Directors for the Positive Coaching Alliance, the College Football Assistance Fund, and the Cox School of Business at SMU, his alma mater. He is the former Chairman of the Doak Walker National Running Back Award and an alumnus of Leadership Dallas and Leadership Plano. Bob and his wife, Cheryl, recently celebrated their 30th anniversary and have three grown daughters.

## KENNETH B. BEITLER, CFA

**Investment Specialist, Investment Strategies & Solutions  
MetLife**

Kenneth Beitler is an investment specialist, Investment Strategies & Solutions (IS&S) for MetLife's Corporate Benefit Funding (CBF) Group. IS&S represents CBF in the institutional investment community. The group, which is a centralized resource for the organization's institutional securities products, oversees approximately \$70 billion of separate accounts and registered funds. CBF, the company's institutional retirement business, historically has been responsible for generating over 20 percent of MetLife's operating earnings.

Beitler, who joined MetLife in 2013, is responsible for investment manager due diligence and search and selection for portfolios underlying MetLife's institutional product platform. He provides investment and portfolio analysis support to CBF's U.S. Pensions business.

Prior to joining MetLife, Beitler was vice president of Portfolio Analytics at AXA Equitable and co-portfolio manager of several of the firm's portfolios. He was also director of investments at Northstar Financial Services Ltd., where he managed fund selection and due diligence for the launch of a new product platform, as well as investment oversight of Northstar's general insurance account.

Beitler received a Bachelor of Science in Business Administration and a Master of Science in Industrial and Systems Engineering from the University of Florida, and a Master of Arts in Liberal Studies from 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.



## DRIANNE BENNER, CFA\*

**Managing Director  
Appomatox Advisory, Inc.**

Drianne Benner is a Managing Director for Appomatox. She is responsible for business development and client service. Previously, she was Global Marketing Director at Cadogan Management LLC, where she was responsible for overseeing firm-wide marketing and client communications for institutional and family office clients. Prior to joining Cadogan, she spent the ten years, most recently as a Managing Director, at U.S. Trust Company, where she developed and led client and marketing initiatives focused on investment communications, initiated an institutional consultant relations program and serviced large institutional clients. Earlier she worked at Paribas Asset Management, a global asset management firm, in a variety of roles including institutional and

consultant relations to some of the largest U.S. pension funds and as a manager of portfolios in an enhanced quantitative strategy.

She earned a BA from Pennsylvania State University and attended graduate studies in regional planning in international development at Cornell University. She serves on the Board of the New York Society of Security Analysts, Peconic Green Growth as well as on the Philanthropy Committee of the Peconic Land Trust. She is a CFA Charterholder and a member of the New York Society of Security Analysts.



## GUS CATSAVIS, CFA\*

Managing Director  
Pinnacle Asset Management, L.P.

Prior to joining Pinnacle in June 2008, Mr. Catsavis was a Principal at Focus Capital Management LLC from February 2000 to May 2008. From July 1986 to January 2000, he was the President of Asset Consulting Group, Inc. Mr. Catsavis received a B.A. in Economics from Southern Methodist University and an MBA in Finance from Washington University.



## MARGARET CHEN

Managing Director & Head, CA Capital Management  
Cambridge Associates

Margaret is the Head of CA Capital Management, Cambridge Associates' Outsourced Investment Office (OCIO) business. She is a Managing Director at Cambridge Associates and she has been with the firm since 1997. She oversees the liability trust practice at Cambridge Associates and the management of assets of these clients. Over her career at Cambridge Associates, Margaret

has advised a number of non-profit institutions and private clients on investment strategy, asset allocation and manager selection. Prior to joining Cambridge Associates, Margaret was a senior consultant with Coopers & Lybrand Consulting, a general management consulting firm.

Margaret holds a Masters in Public Policy from Harvard University (John F. Kennedy School of Government) and a BA from Yale University. She is a Board member of the Boston Youth Symphony Orchestras and the Yale Scholarship Trust, and was a past President of the Yale Club of Boston.



## DEBORAH S. CHRISTIE, CFA

Managing Director  
Cambridge Associates

Deborah is a Managing Director in Cambridge Associates' Arlington office. She specializes in manager research for U.S. and Canadian equities and index funds.

Prior to rejoining Cambridge Associates in 2011, Deborah co-founded Great Oak Investment Management. As Director of Research and Chief Compliance

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Officer, Deborah oversaw the firm's research efforts on small-cap equities and managed the firm's compliance program. Before starting her own firm, she was a research consultant at Cambridge Associates, where she identified and monitored equity managers and funds. In addition, she was an associate at Willamette Management Associates, where she valued businesses and assets for merger and acquisitions, stock option valuations, venture capital analysis, Employee Stock Ownership Plans (ESOP), estate and gift tax planning, and litigation.



## THOMAS DEEGAN

**Managing Director**  
**Clearbrook Global Advisors**

Tom Deegan is a Managing Director at Clearbrook, and is responsible for overseeing relationships for the firm's institutional clients.

Prior to joining Clearbrook, Tom was the independent Trustee of the Board and Head of the Investment Committee at the Stamford Policemen's Pension Fund. In this role he was responsible for management and investment selection for the \$200MM fund, and during his tenure introduced and implemented a \$50MM Alternative Investment platform including hedge funds, private equity and real estate portfolios. Prior to joining Stamford Policemen's Pension Fund Mr. Deegan was a Founding Partner, Chief Operating Officer and Chief Information Officer at GlobeOp Financial Services, a provider of outsourced middle- and back-office, and fund administration services for the hedge fund community from 2000 to 2004, where he managed client operations, derivative processing, and profit-loss accounting globally.

Deegan was employed at Long-Term Capital Management (LTCM) as Chief Information Officer with responsibility for offices in Greenwich (US), London and Tokyo.

He previously held management positions within several business units at Citicorp in New York, from 1990 to 1993, where he focused on business application development, technical operations, cost analysis and MIS design. He also worked in the defense industry as an electrical engineer at ITT Avionics, from 1985 to 1989.

He is the recipient of the 2011 Stamford Police Association's Presidents Award for contributions related to work on the Stamford Policemen's Pension Fund. Mr. Deegan received his MBA from Iona College in New Rochelle, N.Y. and a B.E. in Electrical Engineering from Manhattan College in Bronx, New York.



## KRISTEN DOYLE, CFA

**Partner, Head of Public Pension Funds**  
**Aon Hewitt Investment Consulting**

Kristen is a Partner within AHIC, leads the firm's public fund business, and is a member of the firm's client advisory group. As the head of public funds, Kristen is responsible for new business development and ensuring that AHIC has the right resources, research, and expertise necessary to properly service public sector clients. She assists with client projects that require her expertise.

She currently works with eight retainer consulting clients, where she is either the lead or co-lead. These clients range from \$200 million to \$400 billion in assets under management and are primarily public pension plans and foundations/endowments. She is responsible for assisting these plans with asset allocation advice, risk budgeting, asset/liability reviews, investment policy development, benchmarking, manager selection and structure, and asset class structure. She is also responsible for reporting and monitoring the investment programs and has been instrumental in structuring public fund performance reports for staff and the board as well as other reports such as risk exposure reporting for both traditional and alternative asset classes and risk management reporting.

Kristen previously led the trust services team in the U.S. focused on custody, securities lending, and transition management. This team also supports the firm in other areas that include foreign exchange, transaction cost analysis, and commission recapture. The team assists clients with searching for vendors in these three areas, structuring a custody or securities lending relationship, and assessing the risks associated with these programs from an operational perspective. With regard to transition management, Kristen was also previously the global head of transition management, responsible for managing the transition management research and implementation team in the U.S., UK, and Canada.

Prior to joining the firm in 2005, Kristen worked at Northern Trust in the custodial operations group for more than two years. She has a Bachelor of Arts in economics from Denison University. She is a CFA charterholder and member of CFA Institute and the CFA Society of Chicago.



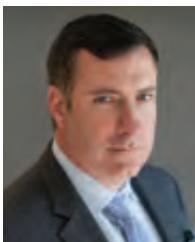
## KATHLEEN POWERS DUNLAP

**Chief Executive Officer  
Girls Who Invest, Inc.**

Kathleen Powers Dunlap is an investment management industry veteran with over 30 years of experience. Most recently, Ms. Dunlap served as Chief Business Strategy Officer for Fiduciary Research and Consulting in San Francisco where she was responsible for executing FRC's strategic business plan and was a member of FRC's investment committee. Beginning in 1989, Ms. Dunlap spent more than a decade as a Managing Director with Barclays Global Investors in San Francisco, where she held leadership positions in sales, consultant relations and marketing. Early in her career, she held positions with Merrill Lynch and Kidder Peabody. Ms. Dunlap received a BS in Economics from the University of San Francisco. Throughout her career, Ms. Dunlap has also been involved with numerous organizations that promote and support women and girls including:

STAND Against Domestic Violence - Board Member  
GirlSource - Board Member and Interim Executive Director  
Barclays WIN (Women's Initiative) - Global Executive Committee Member  
GirlsOnTheRun - Coach  
100 Women in Hedge Funds  
Financial Women's Network  
High Water Women  
Women's Equity Fund (ticker: PWWEX) - Board member and investment committee member

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## JIM DUNN

**Chief Executive Officer, Chief Investment Officer  
Verger Capital Management, LLC**

As Verger's Chief Executive and Chief Investment Officer, Jim oversees all investment decisions and is responsible for setting the course for the company, leading our corporate strategy and ensuring that Verger remains competitively positioned to serve our investors' needs in an increasingly complex and volatile market environment.

Previously, Jim was Vice-President and Chief Investment Officer at Wake Forest University, responsible for investment of the University's endowment, working capital and life income assets of over \$1.4 billion. Prior to joining Wake Forest, Jim served as Managing Director at Wilshire Associates Inc., and Chief Investment Officer and Portfolio Manager for Wilshire Funds Management, the money management arm of Wilshire Associates. At Wilshire, Jim was responsible for providing leadership on asset allocation, investment policy and investment manager selection. Jim served as the Chairman of the Wilshire Funds Management Investment Committee and served as Portfolio Manager for all of Wilshire Fund Management's alternative investment portfolios.

Jim holds a BBA in Finance from Villanova University, where he was a member of the NCAA Division I men's varsity soccer team. Outside the office, Jim spends time with his most important teammates: his wife and two boys.



## BRIAN J. FALCO

**Senior Vice President, Principal  
LCG Associates**

Mr. Falco joined LCG Associates in 1996. He is a member of the Board of Directors and serves on both the Marketing and Benefits Committees. His responsibilities include lead client relationships with foundations, endowments, family offices and corporations with both domestic and international representation.

Brian began his career with Harris Trust and Savings Bank in Chicago and then entered the investment consulting industry with SEI Capital Resources, also in Chicago. Before joining LCG, Brian spent five years as a Consultant with Mercer Investment Consulting, Inc. in Dallas where his clients included public funds, foundations, endowments and corporations.

He earned a Bachelor of Science degree in Financial Management from Clemson University and is an active member of the Clemson Alumni Association. He also pursued graduate studies at Loyola University in Chicago.

Brian currently resides in Lucas, TX with his wife, Fran, and their three sons.



## ROGER FENNINGDORF

**Head of Global Manager Research  
Rocaton Investment Advisors**

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



## ERIC FREEDMAN

**Chief Investment Officer  
CAPTRUST Financial Advisors**

Eric Freedman is CAPTRUST's CIO and a member of the firm's Executive and Operating Committees. Eric is charged with asset allocation research and tactical decision making as well as directing the firm's investment vehicle and manager selection efforts. Prior to joining CAPTRUST, Eric worked for Franklin Street Partners as a Senior Portfolio Manager and the Goldman Sachs Group as a Vice President in Goldman's Equity Derivatives and International Equities businesses. Eric earned his BA in Economics from Colgate University, magna cum laude, and was captain of the Colgate Lacrosse team. He has an MBA from the Wharton School of the University of Pennsylvania, where he double-majored in Finance and Management. Eric serves as the Chairman of the Diocese of Raleigh Investment Committee, the Board and Finance Committee of the Ronald McDonald House of Chapel Hill, and the Monday Life Board.



## JEFFREY D. FURST, CFA, CAIA

**Vice President, Hedged Strategies  
Fund Evaluation Group**

Jeff Furst is a Vice President on the Hedged Strategies team at Fund Evaluation Group. Jeff is primarily focused on conducting investment manager due diligence, client education and support, and the analysis of equity-related hedge fund strategies. Jeff also serves as senior member of the Global Equity research team. Fund Evaluation Group is a recognized leader in the field of institutional investment consulting advising on over \$51 billion in client assets. Prior to joining Fund Evaluation Group in 2011, Jeff served as a Senior Investment Analyst at Summer Hill Capital Partners. Jeff received his MBA from the Williams College of Business at Xavier University and his B.S. from Miami University. Jeff also holds the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations.

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## LAUREN GARNER

**Director, Asset Management  
Perella Weinberg Partners**

Ms. Garner is a Director at Perella Weinberg Partners and a senior member of the firm's Agility outsourced CIO investment team. Prior to joining the firm, she was a Portfolio Manager at GoldenTree Asset Management, where she was responsible for sourcing and managing investments across the capital structure in special situations and stressed credits. Ms. Garner was previously a Senior Analyst at JD Capital Management, where she was a key member of the team tasked with investing in distressed and high yield credit for the multi-strategy fund. Previously, she was with Tudor Investment Corporation as a Distressed Debt and Public Equity Analyst and began her career in Investment Banking at Morgan Stanley. Ms. Garner serves on the Investment Committee of JEWISHcolorado, a Colorado-based foundation focused on meeting the needs of the Jewish community both locally and abroad. Ms. Garner graduated *magna cum laude* from Princeton University with a B.S.E. degree in Operations Research and Financial Engineering.



## MICHAEL GILLIS

**Senior Vice President, Business Development  
Greystone Managed Investments, Inc.**

Michael Gillis is Senior Vice-President, Business Development of Greystone Managed Investments Inc.

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

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

Michael is also an active board member for the Association of Investment Management Sales Executives (AIMSE) and Benefits and Pensions Monitor. Michael is also actively involved in the Canadian Benefits and Pension Institute (CPBI), the Association of Canadian Pension Managers (ACPM), the Canadian Association of University Business Officers (CAUBO), and the International Foundation of Employee Benefits (IFEBP). Michael serves on the board of two charities, MAGICANA and Georgetown Walk for Wishes (Ontario).



## SCOTT GRAHAM, CFA

Chief Investment Officer & Managing Director  
Highland Associates

Mr. Graham joined Highland Associates in 2006 as a consultant to the firm's institutional client base. He currently serves as Highland's Chief Investment Officer and Managing Director. Mr. Graham is also Chairman of the Investment Committee, a member of the Leadership Team and Engagement Committee. He is a shareholder in the firm. Prior to joining Highland Associates, he worked

at Vulcan Materials Company as a Senior Financial Analyst. Mr. Graham previously worked at CNHI and NCP Solutions in an Analyst role. He is a member of the CFA Society of Alabama. Mr. Graham earned his bachelor of science in finance from Troy University and his master of business administration from the University of Alabama at Birmingham. He is a CFA charterholder.



## E. CONNELL HASTEN

Director of Investments  
EquiTrust Life Insurance Company

Connell Hasten is the Director of Investments at EquiTrust Life Insurance Company, an insurance company with approximately \$16 billion in assets.

Connell is responsible for a large portion of the investments, including debt and equity in both the public and private spaces. Prior to EquiTrust, Connell was a Director at Guggenheim Partners and served as a Portfolio Manager in

the commercial real estate sector. While at Guggenheim Partners, Connell was responsible for \$8 billion of commercial real estate holdings, which consisted of debt and equity, on behalf of five insurance companies. Previous to Guggenheim, Connell was a Vice President at Bank of America in the Special Situations Group and was responsible for resolving \$500+ million distressed commercial real estate. Also at Bank of America, Connell originated and underwrote LIBOR based short-term construction real estate loans to large developers, private equity sponsors and REITS.

Connell serves on the Board of the ULI Chicago District Council, a non-profit organization with the goal of providing leadership in the responsible use of land and creating and sustaining communities. Connell also founded a 501(c)(3) non-profit charity called The JEH Foundation for Pancreatic Cancer, which provides an annual scholarship to aspiring college students with financial needs. In addition to the aforementioned non-profit boards, Connell also sits on the Advisory Board of three private equity funds.

Connell earned a B.S. from Indiana University's Kelley School of Business and a MBA from Northwestern University's Kellogg School of Management.



## RODERICK HENNEK

Managing Director & Founder  
Atlanta Consulting Group

Rod is one of the founders and principal consultants of the Atlanta Consulting Group. For nearly 30 years, he has been dedicated to providing best-in-class client service, always acting in the best interest of the clients he serves.

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Detailed and analytical, Rod is passionate and devoted to helping clients pursue their important investment objectives.

After establishing the Atlanta Consulting Group in 1985, Rod also served as the branch manager of the Atlanta office of Morgan Keegan. Earlier in his career, he worked at Merrill Lynch in Kansas City, Missouri, as an account executive specializing in corporate services and retirement plan investing. While there, Rod developed and marketed the firm's retirement plan evaluation service and investment advisor selection process.

Rod earned a bachelor's degree from the United States Air Force Academy and fulfilled his military service upon graduation. He furthered his education by earning a master's degree in operations management from the University of Arkansas.

Rod is active in many organizations. He is a member of the Investment Management Consultants Association and a past member of the Southern Association of College and University Business Officers. He is a member of the investment committee for the United States Air Force Academy Association of Graduates Endowment and serves on the service academy selection committee for the 3rd District State of Georgia, House of Representatives. In addition, Rod serves on the board of the Children's Museum of Atlanta.

Originally from Lexington, Nebraska, Rod lives in Marietta, Georgia, with his wife, Lynne. They have three children, Darci, Kurt and Kristin. Rod is also a member of the Catholic Church of St. Ann, a past member of Boy Scout Troop 1776 and a former Eagle Scout.



## DAVID HYMAN, CFA

Partner  
Mercer Investment Consulting

David Hyman is a Partner in Mercer's Investments business and leads the US Wealth Management Segment. He works with a variety of clients, which include financial intermediaries, corporations and non-profits. David assists his clients in developing and implementing their unique investment strategies to help them meet their long-term goals and objectives. 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 is a frequent speaker at national industry conferences and events, addressing a wide variety of topics. David is a member of Mercer's internal Wealth Management Strategic Research Team and chairs the Equity Strategic Research Team.

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 license. David serves as an Investment Committee member of the Westport (CT) Public Library.



## GERALDINE JIMENEZ, CFA

**Portfolio Manager - Engagement  
California State Teachers' Retirement System**

Geraldine Jimenez has over 25 years of public pension and investment management experience. Ms. Jimenez began her career at CalPERS and has experience in asset allocation, multi-asset strategies, and stakeholder engagement. Ms. Jimenez joined CalSTRS in 2015 as Portfolio Manager reporting to the Deputy Chief Investment Officer (DCIO) responsible for Investment Branch engagement activities. Ms. Jimenez oversees and provides assistance to the Chief Investment Officer, DCIO and the senior investment management team on external matters such as environmental, social, governance, geopolitical, labor and in-state investment issues. Ms. Jimenez works closely with the CalSTRS Communications and Governmental Relations divisions and represents the Investment Branch as a liaison for all external investment matters. Her responsibilities include research and market analysis, interacting with internal and external investment managers, external advisors, consultants, industry peers and stakeholders. Ms. Jimenez participates on several internal investment committees such as the tactical asset allocation and risk allocation committees.

Ms. Jimenez is a Chartered Financial Analyst (CFA) and past President/Board member of the CFA Society of Sacramento for eight years. Ms. Jimenez also holds a Bachelor of Science degree from California State University, Sacramento in Business Administration with a minor in Economics. She is a board member for a California non-profit organization providing services to at risk young adults.



## ELIZABETH JOURDAN, CFA

**Deputy Chief Investment Officer  
Mercy**

Elizabeth was hired in 2015 as Deputy Chief Investment Officer for Mercy Health, a Catholic health care system based in Saint Louis, Missouri. She is responsible for overseeing Mercy's \$2.5B investment portfolio including portfolio management, investment due diligence, and sourcing of unique investment opportunities. Elizabeth previously was an Assistant Vice President of Investments at Allied World, a publicly traded P&C insurance company with a \$9B investment portfolio. At Allied World, Elizabeth was responsible for monitoring investment strategy and performance results, and she also oversaw trade execution for approximately \$1B of internally-managed equity ETFs and fixed-income securities. During her tenure at Allied, she did a rotation at MatlinPatterson, a distressed credit hedge fund, performing deep credit work on Puerto Rico municipal bonds. Elizabeth also was a voting member of Allied World's Singapore Investment Committee. Prior to Allied World, Elizabeth was an investment strategist at Prime Advisors, a core fixed-income asset manager with \$12B of assets under management.

Elizabeth is a member of the CFA Institute, the St. Louis Society of Investment Analysts, 100 Women in Hedge Funds, and Women with a Mission. Elizabeth also previously served as a board member of the Windsor Education Foundation (Windsor, CT).

Elizabeth was recently included in *Chief Investment Officer Magazine's* 2016 '40 Under 40'. She received her BA from Babson College (Boston, MA) and is a CFA charterholder.

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## KEVIN A. JOY\*

**Director**  
**Weitz Investment Management**

Kevin is responsible for Midwestern business development at Weitz Investment Management. In his role he identifies, develops and cultivates strategic relationships with institutional investors, consultants, and financial intermediaries. Prior to joining Weitz Investments, Kevin spent five years at Heartland Advisors as Head of Institutional Sales and Marketing. Prior to his time there, Kevin was with New York Life Insurance Company/NYLEX Benefits as a Managing Director. For much of his career, he was a Vice President and Regional Director in the Private Wealth and Investment Management divisions of Goldman, Sachs & Co. where he focused on business development and advisory services.

Kevin earned his undergraduate degrees in Mechanical and Biomedical Engineering from Carnegie Mellon University and an MBA in Finance from Washington University in Saint Louis. He holds Series 7 and 65 licenses and has earned the Claritas® Investment Certificate. In 2012, Kevin was included in *DiversityMBA Magazine's* Top 100 Under 50 Diverse Executive & Emerging Leaders. Prior to his roles in financial services, Kevin was an Advisory Client Manager at IBM, where he was the recipient of several IBM Marketing Excellence Awards.

In his spare time, Kevin serves on the Board of Directors for both City Year Milwaukee and the Rogers Memorial Hospital Foundation. He is also an emeritus member of the Auxiliary Board of the Art Institute of Chicago.



## ROBERT KOWALSKI

**Director of Investments**  
**Beaumont Health**

Robert Kowalski is the Director of Investments at Beaumont Health, an eight hospital health system located in Southeast Michigan with over \$4 billion in annual revenue. Mr. Kowalski has more than 15 years' experience in institutional investing and is responsible for managing the organizations \$3 billion in financial assets.

In managing the assets, Mr. Kowalski works closely with the Beaumont Health Investment Committee to identify and implement investment strategies across both traditional and alternatives asset classes. These strategies are allocated across four unique investment portfolios that each have different risk / return objectives.

Mr. Kowalski joined Beaumont Health in October 2012. Prior to Beaumont Health, he was the Senior Pension Manager at Visteon Corporations where he oversaw its \$1.2 billion pension plan (2008-2012). Mr. Kowalski began his investment career at Oakwood Hospital in 2001, where he managed the organizations \$900 million in financial assets.

Mr. Kowalski earned a BS in Accounting from Madonna University in 1997. He is a Level II CFA candidate and has passed Level I of the CIPM exam.



## NIKKI KRAUS, CFA

**Managing Director  
Strategic Investment Group**

Nikki oversees the building of Strategic Investment Group's client relationships and drives the firm's marketing strategy. She has more than two decades of experience in the Outsourced Chief Investment Office (OCIO) industry, having most recently served as Director of Institutional Business at Hirtle, Callaghan & Co., where she worked with the firm's largest clients and ultimately led the institutional practice. Prior to that she spent nearly 12 years at SEI Investments working with endowments, pension funds, healthcare organizations and foundations.

Nikki has extensive experience working with college and university endowments. She has actively collaborated with NACUBO for nearly a decade and has presented at NACUBO events multiple times, including at NACUBO EMF in 2013 and on an Endowment Study Webcast in 2013. She is often asked to provide insights on best practices for college and university Investment Committees.

Nikki holds a B.A. in English and Computer Applications from the University of Notre Dame. She is a CFA charterholder and a member of the CFA Society of Philadelphia.



## ALON KUTAI

**Senior Managing Director, Asset Management Division  
Rivel Research Group**

Alon Kutai has been in the Financial Services Industry for 30 years. He began his career as a high yield bond trader for Drexel Burnham Lamberto and since then he has had various roles buy side, sell side and in investor relations. Alon has worked for notable firms as Prudential Securities, UNX, SEI and Sanders Morris. For the past 5 years, Alon has been a Senior Managing Director with Rivel Research Group, a 25 year old marketing research firm that serves both asset managers and public companies.



## JOHN LARSON\*

**Director  
HGK Asset Management**

John joined HGK Asset Management in 2014 and is responsible for developing and managing consulting relationships. John has 20 years of institutional asset management experience serving in both client service and business development capacities. Prior to joining HGK, John was a principal and Executive Director for Echo Point Investment Management. From 2000 to 2011, he was Managing Director with Gardner Lewis Asset Management where he led the institutional business development and client service teams. Previous experience includes Philadelphia firms Cooke & Bieler and Penn Capital Management where he began his investment management career in 1995. John received his BA from the University of Virginia. He is an active participant in AIMSE events. John is an Executive Committee member and Vice President of the Board of the Delaware Museum of Natural History.

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## JEFF MACLEAN

Chief Executive Officer  
Verus Investments

Mr. MacLean joined Verus (previously known as Wurts & Associates) in 1992 and is primarily responsible for managing the firm and providing investment advice to several clients. He has over 25 years of investment and consulting experience, working with all asset classes for a range of clients including corporate defined benefit plans, public institutions, multi-employer trusts, endowments, and foundations. He also chairs the firm's management committee and is a member of the alternative investments committee. Mr. MacLean often speaks at investment forums regarding the macro-economic environment, asset allocation, risk management, alternative investments, and industry trends.

Prior to joining Verus, Mr. MacLean was Vice President of Shurgard Realty Group, a real estate advisory firm, and a consultant for Arthur Andersen & Company. Mr. MacLean currently volunteers for Children's Hospital of Los Angeles and he serves on the advisory board for the University of Washington Foster School of Business. He holds a master's degree in business administration (MBA) from the Darden School of Business and a bachelors degree in business administration (BBA) from the University of Washington, where he served as student body president in his senior year.



## CRAIG METRICK, CAIA

Director of Manager Due Diligence and Thematic Research  
Cornerstone Capital Group

Craig Metrick is Director, Manager Due Diligence and Thematic Research at Cornerstone Capital Group, where he oversees the firm's manager and fund outreach and review process. Craig supports the Cornerstone Capital Investment Management (CCIM) business by helping to ensure the firm provides clients with a robust investment product solutions suite, via the proprietary *Cornerstone Portfolio Solutions* (CPS) platform.

Previously, Craig was Principal and US Head of Responsible Investment at Mercer, working with a variety of public and private clients — from multibillion dollar pension plans to smaller institutions and family foundations. For nearly 15 years, he has consulted on implementing responsible investment principles and mandates. Craig's work has included portfolio construction, manager selection and monitoring, and the development of intellectual capital across issues and asset classes. Before joining Mercer in 2006, Craig was a Director at the Investor Responsibility Research Center, Inc. (IRRC), which provided ESG research to institutional investors.

Craig is a Chartered Alternative Investment Analyst and a member of the CAIA Association. He is a member of FTSE4Good US Advisory Committee. In addition, Craig was elected to two terms to the Board of Directors of the US Forum for Sustainable and Responsible Investment (USSIF) where he served on the Executive, Membership and Education Committees and was a Trustee of the staff-defined contribution plan.

Craig graduated with a degree incorporating international relations, economics and environmental science from Bradley University and has a Master's degree in environmental science and public policy from George Mason University.



## JOHN MIRANTE, CFA, CPA\*

Senior Relationship Manager  
BMO Global Asset Management

John is a member of BMO Global Asset Management's institutional client relationship team. In this role, John acts as a key advisor to the firms' clients, managing and expanding relationships across multiple asset classes. John is also a member of the BMO GAM's Responsible Investing-ESG Committee. He began his financial services experience in 1994, and joined BMO Global Asset Management U.S. in 2013.

Prior to joining the firm, he was an Investment Relationship Manager with Northern Trust Asset Management's institutional client group. Prior to Northern Trust, John was a Vice President with Credit-Suisse, and served as a Portfolio Consultant for their CS HOLT research division. Prior to Credit-Suisse, John was an internal auditor for Kraft Foods, and an external auditor for Crowe Chizek.

John received a B.S. in Accountancy from Northern Illinois University. He holds the Chartered Financial Analyst® (CFA) designation. He is a member of the CFA Society of Chicago, and currently serves as Co-Chair of the Society's Career Management Advisory Group. He holds the Series 3,7 & 63 securities licenses, and is a Certified Public Accountant.



## AARISH PATELL, CAIA

Research Consultant, Private Equity  
NEPC, LLC

Aarish is a member of the Firm's Private Equity Research Group. He is responsible for conducting manager due diligence, providing educational overview materials for various private equity strategies and constructing investment plans for implementation in client portfolios.

Prior to joining NEPC in 2015, Aarish was a Private Equity Consultant at Aon Hewitt (formerly known as Hewitt EnnisKnupp). At Aon Hewitt, Aarish sourced, researched and presented new private equity manager opportunities to clients. He also served as client lead for Aon Hewitt's largest discretionary client in private equity. Prior to Hewitt Ennis Knupp, Aarish worked as an Associate for Fisher Lynch Capital, where he conducted private equity manager and co-investment diligence. Aarish's previous work experience also includes serving as an Investment Banking Analyst at Bear Stearns.

Aarish received his M.B.A. from the University of Chicago Booth School of Business, and his B.A. in Business and Economics from the University of California Los Angeles. Aarish holds the CAIA (Chartered Alternative Investment Analyst) designation and is currently pursuing the CFA (Chartered Financial Analyst) designation.

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## JOHN PATIN

**Senior Vice President, Investment Group  
AWAC Services Company, Inc.**

John serves as Senior Vice President of Investments with Allied World Assurance Company Holdings, AG. He is responsible for the oversight of Allied World's investment portfolio, including portfolio strategy, tactical asset allocation, performance and risk monitoring and day-to-day involvement with the company's investment advisors. Prior to joining Allied World, John was Vice President of Investments at Alterra, a Bermuda based Insurance Company. John was previously a founding member of Alstra Capital Management, a Hedge Fund of Funds, and served as Director of Research. Alstra Capital was a spin-out of Moore Capital Management, a New York based, global macro hedge fund that John joined in 2001. John graduated with a B.S. in Economics and International Relations from the University of Wisconsin-Madison.



## TAMMIRA PHILIPPE, CFA\*

**President & Director  
Bridgeway Capital Management**

Tammira Philippe, CFA, is President and Director of Bridgeway Capital Management, Inc. and is a member of the firm's Portfolio Review and Risk Committee. As President, Tammira's responsibilities include development and execution of the firm's strategy, oversight of all operations, and contributing to marketing and client service efforts. Prior to becoming President,

Tammira led strategy and operations projects at Bridgeway from 2005 to 2010 and was head of Marketing and Client Service from 2010 to 2016. Tammira earned an MBA from Stanford's Graduate School of Business and graduated Summa Cum Laude with a BS in Computer Science from Texas A&M University. Her experience prior to Bridgeway includes strategy consulting with McKinsey & Company and business development and marketing for a global satellite communications start-up.



## BRYAN J. PINI, CFA

**President & Chief Investment Officer  
Mercy Investment Services**

Bryan J. Pini, CFA, is the president and chief investment officer of Mercy Investment Services. Prior to joining the organization in 2007, Bryan was the treasurer and chief investment officer of Saint Louis University. Previously, he served as the director of finance and administration for the Jewish Federation of St. Louis and the director of treasury services for Sisters of Mercy Health

System. Bryan holds a bachelor of science degree in accounting from Bradley University and a master of business administration degree in finance from Washington University. He is a Chartered Financial Analyst and a member of numerous professional and community organizations.



## TRAVIS PRUIT, CFA

Principal, US Delegated Endowment/Foundation Leader  
Mercer Investments

Travis is a principal, senior investment consultant and the US business leader for Outsourced CIO services for not-for-profit clients. He is based in the Boston office of Mercer Investments. Travis has over 20 years of investment experience. Prior to joining Mercer, Travis was a Senior Advisor and Co-Chief Investment Officer for Arnerich Massena, Inc. As Senior Advisor, Travis provided investment consulting services to institutional clients, including foundations, endowments, and corporate and public retirement plans. As Co-Chief Investment Officer, Travis assisted the CIO and investment committee in setting the investment direction for the firm, identifying market opportunities, researching broad economic factors, managing the development of capital market assumptions, and participating in all facets of manager selection.

Travis has written several articles on the topic of risk in not-for-profit portfolios, including appropriate definition and consideration of risk for the investing organization and to the responsible fiduciaries, and how to incorporate that consideration of risk into portfolio advice and implementation. Travis has spoken on the importance of the intersection of risk and expectations in successful portfolio design and benchmarking. Travis received his B.S. in Business-Finance from Oregon State University, and has earned the right to use the Chartered Financial Analyst designation.



## CHRIS RAE

Founder & Managing Director  
Elevation Marketing Advisory

Chris is Founder and Managing Director of Elevation Marketing Advisory, an outsourced marketing and client service business. Elevation Marketing Advisory, established in February 2016, is a business division of Elevation LLC, a Charlotte-based broker-dealer. In addition to its marketing advisory and execution businesses, Elevation LLC has an exclusive distribution arrangement

with Variant Perception, a leading provider of cross-asset class, data-driven market commentary and research.

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

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

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Associate in Goldman's Investment Banking Division primarily covering natural resources and industrial companies.

Chris received both his AM and BA in Philosophy from Stanford University and his JD/MBA from Duke University. Chris is on the board of AIMSE (The Association of Investment Management Sales Executives) and currently serves as Vice President.



## KRISTIN M. REYNOLDS, CFA, CAIA

Partner  
NEPC, LLC

Kristin joined NEPC in 2003, with investment experience dating back to 1999. Kristin is a member of our Philanthropic and Private Wealth consulting practice and focuses on leading research efforts for our clients. Kristin's expertise is in total enterprise management, asset allocation and portfolio construction, modeling and implementation of spending based asset allocation studies, and evaluation and selection of alternative investment managers. She is a member of the Partners' Research Committee, which sets direction for firm research.

Kristin developed a model for Total Enterprise Management. This model integrates the short-term operational needs with the long-term goals of an organization. Total Enterprise Management is an extension of Spending in an Integrated Asset Liability Framework, a white paper Kristin published that discussed the model that analyzes the spending requirements of Endowment and Foundation clients. She is a frequent speaker at industry conferences, where she generally is asked to speak about the Endowment Model, Total Enterprise Management, Integrated Spending Policy, and Portfolio Construction.

Prior to joining NEPC, Kristin worked at Citigroup Asset Management, where she specialized in executive compensation structures for large corporate clients. She worked closely with clients to develop and manage financial service strategies. Prior to her investment career, Kristin worked as a loan service officer at a community cooperative bank where she was responsible for external audit compliance, escrow fund accounting, and loans receivable.

Kristin earned an M.B.A. from Simmons Graduate School of Management, and a B.A. in Finance and Economics from Simmons College. Kristin is a CFA charter holder and a member of both the Boston Security Analysts Society and the CFA Institute. Kristin became a Chartered Alternative Investment Analyst (CAIA) designee in 2008. Kristin was nominated in 2011 for Endowment and Foundation Consultant of the Year by Foundation and Endowment Money Management.



## JEFFREY K. RINGDAHL

Chief Operating Officer and Member of the Board of Directors  
American Beacon Advisors

Mr. Ringdahl is the Chief Operating Officer and a member of the Board of Directors of American Beacon and its affiliated companies. Prior to joining American Beacon in 2010, Mr. Ringdahl spent six years with Western & Southern Financial Group, including Vice President of Product Management for the company's mutual fund subsidiary, Touchstone Investments. Mr. Ringdahl's

other experience includes investment and operational roles with Fidelity Investments and State Street Global Advisors. Mr. Ringdahl received his BA in Economics from Boston University and MBA from the University of Notre Dame.

American Beacon provides investment advisory and administrative services to mutual funds, institutions, defined benefit plans and defined contribution plans. The Company was founded in 1986 and had approximately \$48 billion in assets under management as of December 31, 2015. American Beacon is comprised of three principal lines of business: Mutual Fund Advisory and Administration, Pension Plan Advisory and Fixed Income Separate Accounts and Money Market Funds.



## MARK ROBERTSON

**Director of Business Development  
Proprietary Capital**

Mark Robertson is the Director of Business Development at Proprietary Capital in Denver, Colorado. Prior to joining Proprietary, Mr. Robertson was the COO and Founding Partner of Silvergate Capital Management, a Denver based health care hedge fund. Prior to starting Silvergate, Mr. Robertson was a Vice President at Morgan Stanley in New York City. He worked in the Institutional Equity Division selling the firm's equity products to US based asset managers. Mr. Robertson started his career in investment management at Paine Webber selling the firm's diversified research product to West Coast based asset managers.

Mr. Robertson received his bachelor's degree in business administration, with a concentration in finance, from the University of Vermont.



## LUKE SCHLAFLY, CFA

**Vice President, Institutional Business Development  
Deutsche Asset Management**

Luke is a Vice President at Deutsche Asset Management. He is responsible for developing relationships with institutions across North America, with a primary focus on insurance investors. He is based out of the Chicago office and leads coverage of the US Midwest and Canada.

Luke earned a BS in management from Boston College University and holds the CFA designation. Luke also serves on the board of Big Brothers Big Sisters of Chicago.



## KERRA MARMELSTEIN SMITH\*

**Managing Director, Investor Relations  
Forester Capital L.L.C.**

Ms. Smith has thirteen years of experience in the financial industry with three years in investment consulting and 10 years of hedge fund industry experience. Ms. Smith attended Bowdoin College, where she graduated with a BA in Mathematics and Economics. After Bowdoin, she worked as a Consulting

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Associate at Cambridge Associates in Boston, Massachusetts and was promoted to Senior Consulting Associate in 2004. In 2005, Ms. Smith joined JP Morgan Alternative Asset Management focusing on Client Solutions. Following JP Morgan, Ms. Smith worked in Investor Relations in the hedge fund industry before joining Forester in 2015.



## MARK STAHL, CFA

Senior Vice President, Global Manager Research  
Callan Associates Inc.

Mark N. Stahl, CFA, is a Senior Vice President and Co-Manager of Callan's Global Manager Research group (GMR) which provides fundamental and statistical research on investment managers. Mark oversees the quantitative and qualitative analysis of investment managers and the production of research and client reports. Mark also heads U.S. equity research. He researches and analyzes money management firms with various investment styles for defined benefit and defined contribution clients. Mark works with general consultants and oversees manager searches, conducts on-site visits, and attends final presentations. He regularly interviews and visits portfolio managers and analysts to discuss portfolio strategies, organizational issues, and marketplace trends. Mark is a member of Callan's Management Committee and is also a member of the Investment Committee for the following Callan managed funds: Small Cap, Micro Cap Value, KP Growth Fund. He is a shareholder of the firm.

Prior to joining the U.S. Equity group, Mark was a member of Callan's Fixed Income Research group where he gathered, analyzed, and verified data on U.S. and non-U.S. fixed income investment managers.

Mark earned a BS in Managerial Economics from the University of California at Davis and earned the right to use the Chartered Financial Analyst designation.



## MARK SULLIVAN\*

Director, Institutional Sales & Relationship Management  
Stralem & Company

Mr. Sullivan joined Stralem in 2014 with extensive sales, relationship management, consultant relations and product development experience. Prior to joining Stralem, he was a Vice President with American Century Investments, where he led the relationship with Canadian Imperial Bank of Commerce, their largest outside investor. Previously, Mr. Sullivan spent 10 years at AllianceBernstein where he was a Managing Director in their Institutional and Sub-Advisory businesses. He began his career at Prudential Asset Management in 1984 and then took on increasingly senior roles in sales, relationship management and consultant relations at Bankers Trust, Nicholas-Applegate Capital Management and Chartwell Investment Partners.

Education: US Military Academy, West Point; BS, Georgetown University.



## MIRIAM TAI, CFA, CAIA\*

**Managing Director of Business Development  
CIFC Asset Management LLC**

Miriam Tai is a Managing Director of Business Development at CIFC Asset Management, a \$14 bn corporate loan specialist. Previously, she was Global Head of Consultant Relations at Itaú Asset Management, a Brazilian manager specializing in Latin American investments. Prior to Itaú, she was Head of US Consultant Relations at Man Investments and a Director of Consultant Relations at BlackRock (formerly BGI). Before her asset management days, she spent time in structured finance as well as management consulting. Miriam has a MBA from the Haas School of Business, UC Berkeley, and an A.B. in Political Science from the University of Chicago. She holds both the CFA and CAIA designations. She's a native from Hong Kong, fluent in Cantonese and passable in French and Portuguese. She spends her spare time on circus activities, golf, teaching Pilates, and traveling.



## MARC A. TOURVILLE, CFA, CIPM

**Managing Director  
Cardinal Investment Advisors**

Marc is a Partner and Managing Director at Cardinal Investment Advisors, LLC. Cardinal is a boutique consulting firm advising insurance companies, pension funds, foundations, endowments and healthcare institutions. They advise client portfolios totaling over \$113 Billion, \$90 Billion of which are with insurance companies. Marc is a lead consultant on client engagements, specializing in the creation, implementation, and monitoring of investment strategies for insurance companies. Additionally, he works with the fixed income manager research team. Marc joined Cardinal in 2004 from LPM Financial Advisors where he was a founding partner advising insurance company assets. Prior to LPM Marc worked in the Insurance Analytics Group at SS&C Technologies using Dynamic Financial Analysis (DFA) models. Marc holds a B.S. in Engineering from the United States Air Force Academy and an MBA from The Ohio State University. He received his CFA charter in 2005.



## CHRISTOPHER E. VELLA, CFA

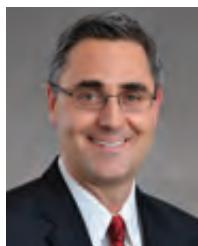
**Chief Investment Officer, Multi-Manager Investments  
Northern Trust Investments**

Christopher E. Vella, CFA, is Senior Vice President of Northern Trust's Multi-Manager Solutions Practice. He is Chief Investment Officer with responsibility for manager research and portfolio construction processes across all of Northern Trust's Multi-Manager Solutions Practice. He is responsible for the global manager research platform at Northern Trust, consisting of approximately \$95B in assets across 200 investment strategies. He manages a team of more than 30 investment professionals across all traditional asset classes. The team covers all external manager relationships on behalf of Northern Trust's private and institutional clientele.

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Prior to joining Northern Trust in 2004, Mr. Vella was a founding member of Goldman Sach's external manager business which consists of institutional and private client assets. While at Goldman, he managed the international and emerging markets equity team. Prior to Goldman Sachs, Mr. Vella spent close to 6 years at SEI Investments working primarily on international equity and emerging markets equity manager research. He has over 20 years of manager research and multi-manager portfolio construction experience.

He received a B.S. magna cum laude in Finance with a minor in Applied Mathematics from Lehigh University and was elected into the Phi Beta Kappa honor society. He is a member of the New York Society of Financial Analysts. Mr. Vella is a CFA charterholder.



## MIKE WELKER, CFA

**President & CEO  
The Bogdahn Group**

Mike Welker is the President/CEO of The Bogdahn Group. At The Bogdahn Group, Mike is the lead consultant on select large client relationships. Along with servicing strategic relationships Mike also manages the day to day operations of the firm and is Chairman of the Executive Committee. Mike is a frequent speaker at industry conferences on a wide range of topics. He has also co-authored a white paper on independent consulting that has been referenced in major publications around the country.

Prior to joining The Bogdahn Group, Mike worked for a leading institutional money management firm where he was responsible for asset allocation decisions and client servicing for institutional accounts. Mike also gained Wall Street experience working for a trading firm on the floor of the New York Stock Exchange.

Education: Bachelor of Arts, Economics, Rollins College; Master of Business Administration, Rollins College Crummer Graduate School of Business; CFA® Charterholder



## ANDREW YONGVANICH, CFA

**Director  
UBS Financial Services Inc.**

Mr. Yongvanich joined UBS in 2009. He focuses on hedge fund manager sourcing, research and selection across a wide variety of strategies. Prior to his current role, he was an analyst in the UBS Graduate Training Program. Mr. Yongvanich received a B.S. in Operations Research and Engineering at Cornell University and is a CFA Charterholder.

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## **RIVEL RESEARCH GROUP**

Contact: Alon Kutai  
57 Greens Farms Road  
Westport, CT 06880  
[akutai@rivel.com](mailto:akutai@rivel.com)  
[www.rivel.com](http://www.rivel.com)

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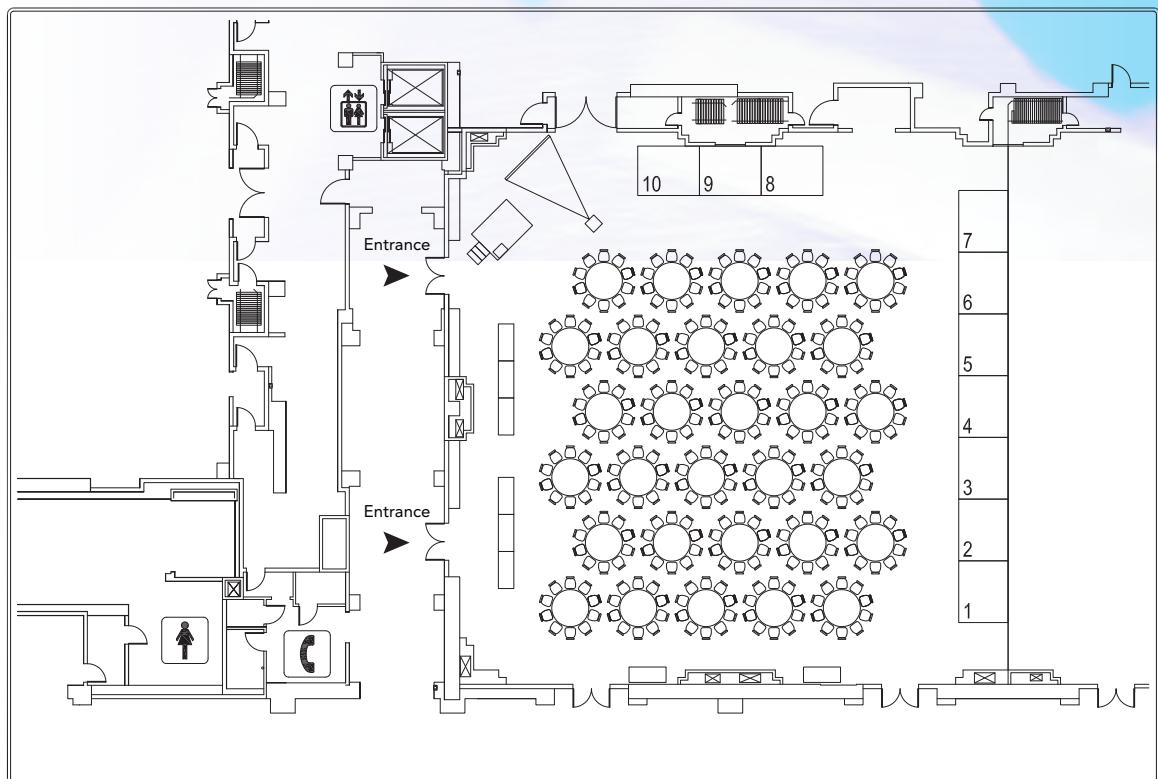
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- BOOTH 9 STYLE RESEARCH
- BOOTH 10 FINSEARCHES

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# RESORT MAP

## FUNCTION SPACE

<b>1</b>	Ballroom Rotunda	LBY
<b>2</b>	Citrus Garden	LBY
<b>3</b>	Coquina Ballroom	LBY
<b>4</b>	Da Vinci Lawn	
<b>5</b>	Da Vinci Lawn North	
<b>6</b>	Da Vinci Terrace	
<b>7</b>	Egret	LBY
<b>8</b>	Florence	LBY
<b>9</b>	Fountain Courtyard	
<b>10</b>	Heron	LBY
<b>11</b>	Lakeside Terrace	LBY
<b>12</b>	Mediterranean Ballroom	LBY
<b>13</b>	Palazzo Ballroom	LBY
<b>14</b>	Pisa	LBY
<b>15</b>	Plaza Ballroom	LBY
<b>16</b>	The Ritz-Carlton Ballroom	LBY
<b>17</b>	Tuscany Ballroom	LBY
<b>18</b>	Tuscany Terrace	LBY
<b>19</b>	Valencia	LBY
<b>20</b>	Valencia Terrace	
<b>21</b>	Wedding Gazebo	

## RETAIL STORES

<b>22</b>	John Craig Menswear	LBY
<b>24</b>	Montage, a JW Shop	LBY
<b>25</b>	The Ritz-Carlton Signature Shop	LBY

## GUEST SERVICES

<b>26</b>	Business Center (self-service)	LWR
<b>27</b>	Attractions Ticket Desk	LBY
<b>28</b>	FedEx/Kinkos	LBY
<b>29</b>	JW Marriott Bell Stand	LBY
<b>27</b>	JW Marriott Concierge	LBY
<b>30</b>	JW Marriott Registration	LBY
<b>31</b>	The Ritz-Carlton Bell Stand	LBY
<b>31</b>	The Ritz-Carlton Concierge	LBY
<b>32</b>	The Ritz-Carlton Registration	LBY

## RESTAURANTS & LOUNGES

<b>33</b>	Bleu Poolside Bar & Grill	LBY
<b>34</b>	Café Bodega	LWR
<b>35</b>	Citron Brasserie	LWR
<b>36</b>	Fairways Pub	
<b>37</b>	JW Lobby Lounge & Sushi Bar	LBY
<b>38</b>	NORMAN'S	LBY
<b>39</b>	PRIMO, by Melissa Kelly	LBY
<b>40</b>	Quench Poolside Bar & Grill	LBY
<b>41</b>	The Ritz-Carlton Lobby Lounge & Bar	LBY
<b>42</b>	Starbucks®	LBY
<b>43</b>	Highball & Harvest	LWR
<b>44</b>	Vitale, Spa Café	LWR
<b>45</b>	Whisper Creek Farm: The Kitchen	LBY



## RECREATION & AMENITIES

<b>46</b>	Bonfire Pit	LWR
<b>47</b>	Fitness Center	LWR
<b>48</b>	Gameroom/Activites	
<b>49</b>	JW Marriott Butterfly Garden	
<b>50</b>	JW Marriott Kids Playground	
<b>51</b>	JW Marriott Towel Hut and Sundries	
<b>52</b>	Kayak Beach	
<b>53</b>	Lazy River Pool	
<b>54</b>	JW Marriott Activities Lawn	
<b>55</b>	Primo Organic Gardens	
<b>56</b>	The Ritz-Carlton Butterfly Garden	



- 57** Eco-Tours and Fishing
- 58** The Ritz-Carlton Pool
- 59** The Ritz-Carlton Spa
- 60** The Ritz-Carlton Towel Hut
- 61** Ritz Kids Club
- 62** Ritz Kids Playground
- 63** Sand Volleyball Court
- 64** Spa Pool
- 65** Tennis Courts
- 66** Bocce Ball Courts

LWR

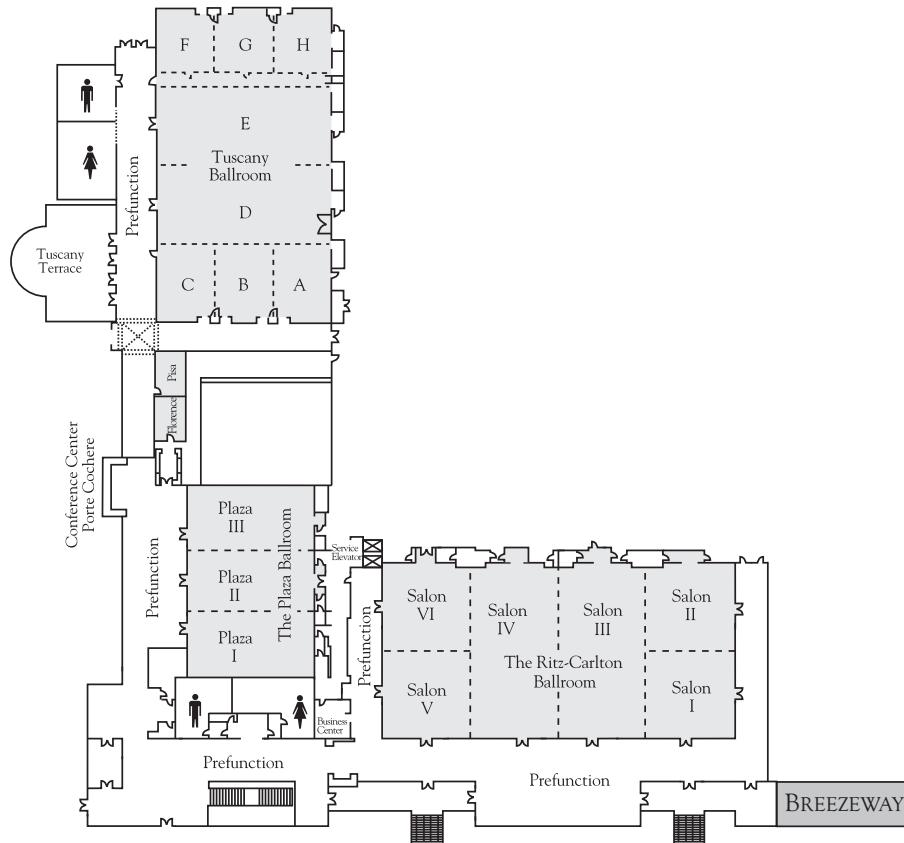
LBY - Lobby Level

LWR - Lower Level

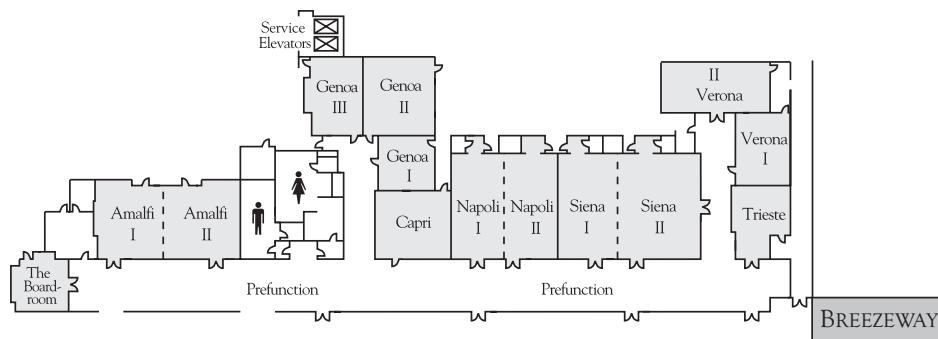
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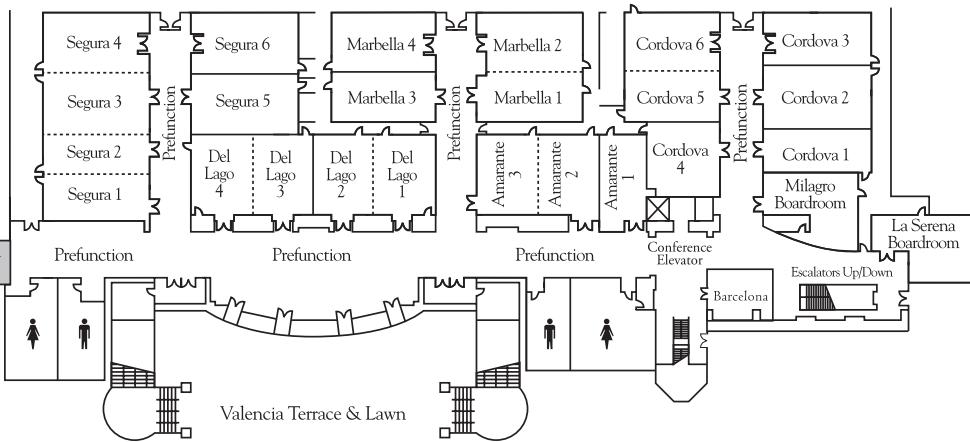
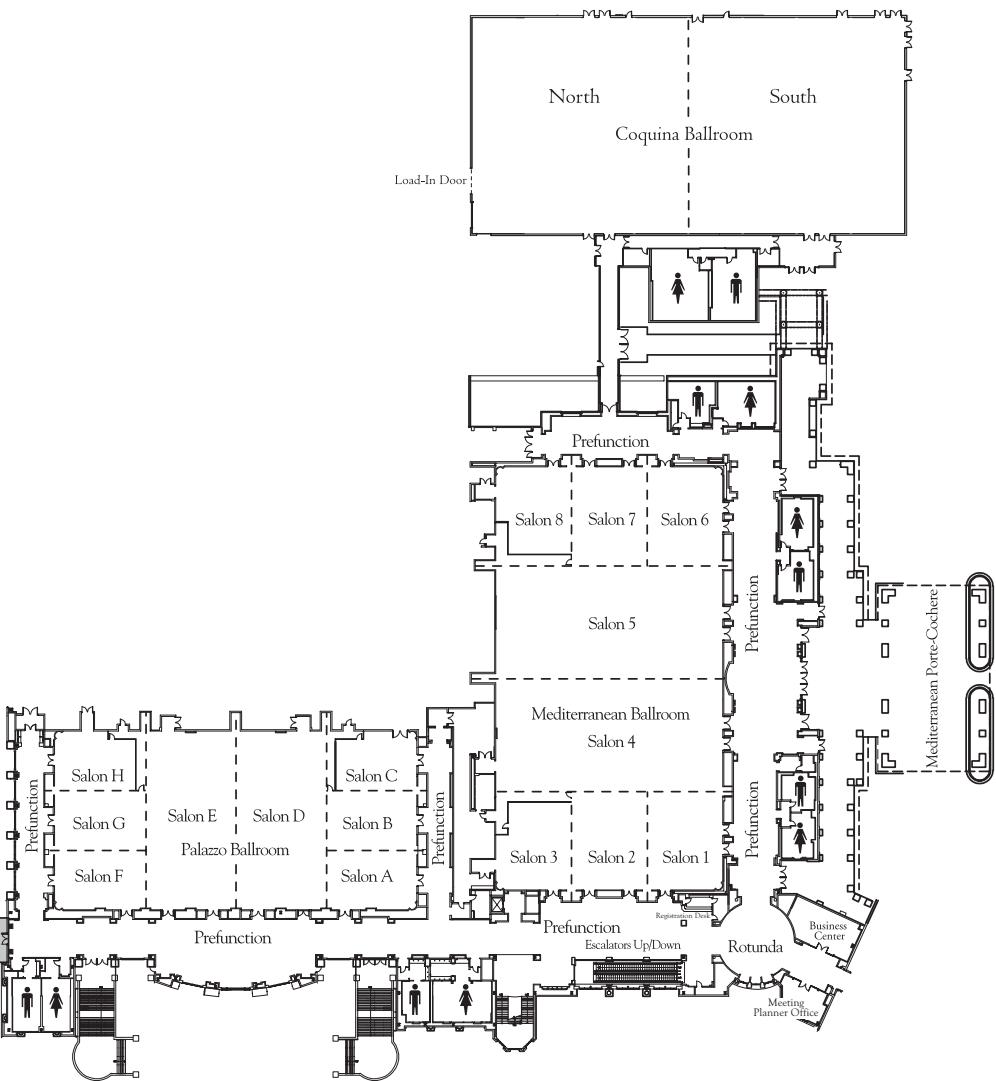
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## THE RITZ-CARLTON LOBBY LEVEL



## THE RITZ-CARLTON LOWER LEVEL





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