



CONVERGENCE. NOW.

AIMSE
**2013 FALL
CONFERENCE**

SEPTEMBER 25-26, 2013
The Princeton Club | New York, NY
CONFERENCE PROGRAM

CONVERGENCE. NOW. AIMSE 2013 FALL CONFERENCE



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CE Qualified
Activity



CFA Institute

CFA Institute has approved this program, offered by AIMSE, for 12 CE credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE tracking tool.

CONVERGENCE NOW. Schedule

AIMSE
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Wednesday, September 25

2:00 – 6:00 pm

Conference Registration

2:00 – 2:10 pm

James Madison Room

Welcome Remarks

Conference Co-Chairs

Greg Weissman, Director, Consultant Relations,
Putnam Investments

Brian Crowell, CFA, Vice President,
AQR Capital Management

AIMSE President

Chris Newman, CFA, T. Rowe Price

2:10 – 3:10 pm

James Madison Room

**Changing Landscape & Opportunity
for Fixed Income... What's Next?**

Speakers:

Ryan Dembinsky, Senior Research Analyst,
Russell Investments

Nick Guglielmo, Treasurer, Corporate Finance,
Associated Press

Donald Steinbrugge, CFA, Managing Member,
Agecroft Partners, LLC

Moderator:

Chris Paoella, Managing Partner, Director of Marketing
& Consultant Relations, Perimeter Capital Management LLC

Hear directly from a diverse panel of prominent experts on the current state of Fixed Income Investing and learn about the strategies they expect to be most effective during the Fed's tapering of quantitative easing. This panel will combine the perspectives of plan sponsor, consultant, manager and marketer and will enable you and your firm to be better positioned to capitalize on the changing landscape for Fixed Income Investing. The times they are a changing... so don't miss out on this chance increase your knowledge of Fixed Income and to directly benefit from the varied insights of our panel of experts.



Wednesday, September 25 (con't)

3:10 – 3:30 pm

Alexander Hamilton Room

Networking Break with Exhibitors

3:30 – 5:00 pm

James Madison Room

Consultant Roundtables

Speakers:

Thomas Forma, CIMA, CRPC, CIS, Senior Vice President, Investments, Merrill Lynch Wealth Management

Bonnie Goldsborough, CFA, Vice President, Director of Research, The Marco Consulting Group

Bruce Graham, CFA, Vice President, CAPTRUST Financial Advisors

Amy Labanowski, Principal, Mercer Investment Consulting

Julie Moore, Partner, International Equity Research, Rocaton Investment Advisors, LLC

Tom Shingler, Vice President, Fund Sponsor Consulting, Callan Associates

Edward Urban, CFA, Vice President, Meketa Investment Group

Moderators:

Alejandra Arguello, Marketing Director, Moneda USA

Adam Craig, CFA, Director, Consultant Relations & Business Development, Analytic Investors, LLC

A hallmark of the AIMSE conferences, the consultant roundtables are always one of the most popular sessions. Join us for an interactive and candid discussion with leading global consultants from both traditional and alternative investments. Come with your questions and hear top consultants share their thoughts on what investors are doing, which asset classes are in demand and how to get (and keep) your products on the radar. There's no formality — just you and your fellow marketers discussing manager search activity, organizational updates, new trends in the consulting industry, how best to communicate with these influential consultants and more. You'll gain great insights from a wide array of top consulting firms and begin the process of building relationships with these key people in an intimate and interactive setting. Don't miss this opportunity for you and your peers to have a direct dialogue with consultants on the key topics and issues confronting marketing professionals today.

5:00 – 6:00 pm

Alexander Hamilton Room

Reception

Wednesday, September 25 (con't)

6:00 – 8:00 pm

James Madison Room

Dinner

Guest Speaker:

Professor **Peter Ricchiuti**,
Tulane University

Peter Ricchiuti is the business school professor you wish you had back in college! He teaches courses on the financial markets at Tulane University's Freeman School of Business. His insight and humor have twice made him the school's top professor. Peter started his career with the investment firm of Kidder Peabody and later managed over three billion dollars as the assistant treasurer for the state of Louisiana. In 1993 he founded Tulane's highly acclaimed Burkenroad Reports stock research program. He has been featured on CNN and CNBC as well as in The New York Times, BARRON'S, The Washington Post and The Wall Street Journal. Over the past twenty years Peter has addressed hundreds of groups in 47 states and several countries, including workshops for the New Orleans Saints.

Professor Ricchiuti will address the following points:

1. The Outlook For Interest Rates
2. Why Higher Interest Rates May Actually Benefit the Stock Market
3. The Negative News "Spin On The Economy"
4. An Historical Look at the Securities Valuation
5. Market Myth Busting
6. Today's Look For Corporate Profits, Margins, and Balance Sheets

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Schedule



Thursday, September 26

7:30 am – 5:30 pm

Conference Registration

7:30 – 8:30 am

Breakfast with Exhibitors

Alexander Hamilton Room

8:30 – 9:30 am

**Endowment & Foundation
Investment Trends**

James Madison Room

Speaker:

Carla Hunter, CPA, CFA,
Chief Executive Officer & Chief Investment Officer,
Weizmann Global Endowment Management Trust

Stephanie Lynch, Managing Director,
Global Endowment Management

Travis Shore, Investment Director,
Alfred P. Sloan Foundation

Matthew Wright, CFA, Founder & President,
Disciplina Group, LLC

Moderator:

Dale Kindregan, Director, Institutional Marketing,
Principal Global Investors

Many E&F CIOs stay awake at night wondering how they will attain 8% nominal annual target returns, while spending 5% annually and not depleting the corpus of the endowment over time. If predictions of an extended low interest rate, low growth, low return environment persist globally, how can this problem be solved?

A lot of people discuss the “endowment model” and argue whether it is dead or alive. In this session, our panel will give their thoughts on what the endowment model means to them and how it may have changed since the financial crisis. Our panel will address their current asset allocations and their goals for the next few years.

- How have liquidity issues evolved since the crisis?
- Are there new models that quantify downside volatility and correlations?
- Are there “themes” built into their portfolios?
- Should investors keep cash on hand for “opportunistic” bets?

We will discuss strategies they like in both traditional and alternative investments.



Thursday, September 26 (con't)

9:30 – 10:30 am

James Madison Room

Defined Contribution — Positioning Your Firm for Success

Speaker:

Kevin Vandolder, CFA, Partner,
National DC Client Practice Leader, Hewitt EnnisKnupp

Moderator:

Mike Raso, Senior Vice President,
Old Mutual Asset Management

10:30 – 11:00 am

Alexander Hamilton Room

Networking Break with Exhibitors

11:00 am – 12:00 Noon

James Madison Room

The Changing Role of Alternatives — How Do They Fit in a Portfolio in the Future?

Speakers:

Alan Kosan, Senior Vice President, Head of Alpha
Investment Research, Segal Rogerscasey

Steve Turi, Managing Partner & Chief Investment Officer,
SkyView Investment Advisors, LLC

Moderator:

Kerry Dempsey, Director of Consultant Relations,
Select Equity Group

The push toward increasing alternatives continues in an effort to bridge the funding gap. Plan sponsors are also breaking down the barriers as it relates to asset class structures, using alternatives such as hedge funds as equity and fixed income substitutes. No longer seen as separate asset classes, how will the move away from traditional versus alternative buckets affect portfolios? Our panel will discuss this shift in thinking and how they look at their asset allocation on a holistic basis.

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Thursday, September 26 (con't)

12:00 Noon – 1:45 pm

Alexander Hamilton Room

Networking Lunch: Making Better Impressions — Presentation Best Practices

Speakers:

Kevin Greeley, President, Greeley Communications

Kerry Galvin, CFA, Senior Consulting Analyst, Russell Investments

Moderator:

David Richardson, CFA, Managing Director, Head of Business Development & Client Service, Impax Asset Management (US)

Join us for a lively and informative panel discussion on the art of making effective presentations during meetings with clients, consultants, and prospective investors. Presentation training expert, Kevin Greeley, will share his insights and perspectives on the key elements of successful presentations. Kerry Galvin, Senior Consulting Analyst will provide views on how investment managers can be most effective in meetings, presentations and finals... or get the hook!

1:45 – 2:45 pm

James Madison Room

Industry Trends, Challenges and Opportunities

Speaker:

Kurt Schoknecht, Managing Director, Investment Management, Greenwich Associates

Moderator:

Maureen Kennedy Hays, Managing Director, Principal Global Investors

We are delighted to have Greenwich Associates share their insights with a strategic overview of the asset management industry. Kurt will discuss key trends, challenges and opportunities to help us think about how to better position our investment strategies, analyze the challenges and opportunities to leverage our strengths to be more strategic and successful.

Thursday, September 26 (con't)

2:45 – 3:45 pm

James Madison Room

Veteran's Panel

Speakers:

Stephen Dunn, Executive Vice President,
Cohen & Steers Capital Management, Inc.

Neal Howe, Managing Director,
Head of Strategy Distribution, Funds and Advisory-Americas,
Barclays Funds & Advisory

Tim McAvoy, Director of Sales,
DePrince, Race & Zollo, Inc.

Moderator:

Chris Krein, Director of Institutional Sales,
WisdomTree Asset Management

Listen to a panel of veterans share their experience and talk about what helps differentiate you and your firm in the marketplace. Bring your questions for an open forum with a panel ready to share years of experience.

3:45 – 4:15 pm

Alexander Hamilton Room

Networking Break with Exhibitors



Thursday, September 26 (con't)

4:15 – 5:15 pm

James Madison Room

Featured Consultant

Speaker:

Tim Barron, Chief Investment Officer,
Segal Rogerscasey

Moderator:

Paul Foster, CFA, Senior Managing Director,
Turner Investments

AIMSE is proud to present Tim Barron, Chief Investment Officer of Segal Rogerscasey, as our featured consultant. Tim is a 35-year veteran of the investment industry who brings the unique perspective of someone who has worked as a consultant, plan sponsor and investment manager. In recent years, Tim has been involved in the consolidation trend in the consulting industry and was part of the leadership team that navigated the successful integration of Segal Advisors and Rogerscasey. In his current role, Tim is responsible for management of the firm's research department and oversight of all investment activities.

Today, Segal Rogerscasey is a leading global investment solutions firm that provides innovative, client-driven consulting advice and outsourcing solutions. The firm has been in operation for more than 40 years and, as one of the largest U.S.-based investment solutions firms, has client relationships worldwide, some in excess of 20 years. The firm provides a full array of services—Investment Consulting, Implemented Investment Solutions, Defined Contribution Consulting and Advisor Solutions—all of which is supported by a deep commitment to a fundamental and strategic research process.

5:15 – 5:30 pm

James Madison Room

Closing Remarks

Conference Co-Chairs

Greg Weissman, Director Consultant Relations,
Putnam Investments

Brian Crowell, CFA, Vice President,
AQR Capital Management

AIMSE President

Chris Newman, CFA,
T. Rowe Price

5:30 – 7:15 pm

Alexander Hamilton Room

Cocktail Reception

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Conference Co-Chairs

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Greg Weissman

Director, Consultant Relations
Putnam Investments

Mr. Weissman is a Consultant Relations Director for Putnam Global Institutional Management. In this role, he is responsible for managing relationships

with investment consultants in the Eastern region of the United States. Mr. Weissman, who holds his Series 7 and 63 licenses with FINRA, is on the board of Proctor Academy and the Association of Investment Management Sales Executives (AIMSE). He joined Putnam in 2011 and has been in the investment industry since 2000. Past experience includes Old Mutual Asset Management as Senior Vice President, Director of Consultant Relations and Cowen & Company, Jefferies, Pacific Crest Securities, SoundView Technology Group. Mr. Weissman received his BBA from Southern Methodist University, B.B.A.



Brian Crowell, CFA

Vice President
AQR Capital Management

Brian leads AQR's Consultant Relations team. Brian, who holds the Chartered Financial Analyst designation, joined AQR in 2007 as a member of the firm's

Portfolio Solutions Group, where he worked with the firm's institutional clients on a broad range of investment policy issues, and was co-author of a paper published in the Journal of Investment Strategy. Brian currently serves as a member of AQR's Long-Only Investment Committee and on the board of the Association of Investment Management Sales Executives. He earned an A.B. in chemistry from Dartmouth College and an M.B.A. with concentrations in analytic finance, economics and accounting from the University of Chicago Booth School of Business.

Moderators & Speakers



Alejandra Argüello

Marketing Director
Monedo USA

Alejandra Argüello has 12 years of experience in the investment management industry. She currently heads the US Institutional sales efforts for

Monedo USA, a leading Latin America-dedicated investment manager with over US\$5 billion in assets under management from pension funds, sovereign wealth funds, life insurance companies, private investors and other institutional clients. Previously, Ms. Argüello worked as a Senior Associate at Everest Capital, a global hedge fund advisory firm. Prior to joining Everest, she was a Vice President at BiscayneAmericas Advisors. She also worked as Assistant Director of Development at the Cato Institute in Washington, DC. Fluent in Spanish, Ms. Argüello received a B.S. in Economics and Political Science from Florida State University. Ms. Argüello is a board member of the Association of Investment Management Sales Executives (AIMSE) and a member of the Alternative Investment and Global Investment Committees for the New York Society of Security Analysts (NYSSA).



Tim Barron

Chief Investment Officer
Segal Rogerscasey

Tim Barron is the Chief Investment Officer of Segal Rogerscasey, responsible for management of the firm's research department and oversight of all investment activities. Mr. Barron chairs Segal Rogerscasey's Investment Committee and is on the Governing Committee of the Global Investment Research Alliance. He has over 35 years of experience in the investment industry. Prior to joining Segal Rogerscasey, Mr. Barron was President and CEO of

Rogerscasey and its head of Research. He also worked as the Director of U.S. Institutional Client Development at Muzinich & Co., a high yield bond investment specialist firm. Prior to that, he was a Principal at Morgan Stanley Dean Witter Investment Management. Before joining Morgan Stanley, Mr. Barron was a Managing Director and Senior Consultant at BARRA RogersCasey, where he led a team providing consulting services to a variety of clients. He was also a consultant with Wyatt Asset Services, the Chief Investment Officer for the Virginia Retirement System, and the Executive Director of the City of Richmond Retirement System.



Adam Craig, CFA
Director, Consultant Relations
and Business Development
Analytic Investors, LLC

Adam Craig is responsible for managing the firm's relationships with investment consultants and plan sponsors across the eastern United States. Adam was most recently with Columbia Management as Director of Consultant Relations. He has also held roles as an investment consultant with Mercer and Towers Watson. He graduated from Penn State University with a B.S. in Mathematics. Adam earned the Chartered Financial Analyst designation and is a Board Member of the Boston Investment Professional Association.

**Ryan Dembinsky**

Senior Research Analyst
Russell Investments

Ryan Dembinsky is a senior research analyst for Russell Investments, focusing on fixed income manager due diligence. Ryan joined Russell in December 2011. Ryan joined Russell from Rogerscasey, where he served as associate director of Fixed Income Research for over five years. Ryan has a broad range of experience researching fixed income managers across all areas of the asset class including core, high yield, global, emerging markets debt, structured securities, bank loans, inflation-linked bonds, and credit-related alternatives. He has also authored a variety of topical fixed income research publications such as researching LDI managers, identifying opportunistic investment opportunities, the evolution of emerging markets debt, and structuring liquidity pools. Prior to Rogerscasey, Ryan worked in fixed income relationship management at Weiss, Peck & Greer-Robeco USA.

**Kerry Dempsey**

Director of Consultant Relations
Select Equity Group

Ms. Dempsey joined Select Equity in October 2011. Prior to joining the Firm, she was the Head of Consultant Relations for Lasair Capital. Prior to Lasair, she was a Vice President at Capital Guardian, where she was responsible for institutional investment consultants on the East Coast. Ms. Dempsey received a B.S. from Boston University.

**Stephen Dunn**

Executive Vice President
Cohen & Steers Capital Management

Stephen Dunn, Executive Vice President, is Director of Institutional Marketing. He is responsible for overseeing the marketing of Cohen & Steers' investment products to institutional investors and consultants globally. He has 26 years of investment experience. Prior to joining Cohen and Steers in 2005,

Mr. Dunn was Director of Marketing at Essex Investment Management Company, LLC. Mr. Dunn received his BA from Brown University and his MBA from Babson College. He formerly served on the Board of Directors of the Association of Investment Management Sales Executives. He is based in New York.



Thomas Forma, CIMA, CRPC, CIS
Senior Vice President, Investments
Merrill Lynch Wealth Management

Tom Forma's practice emphasizes investment consulting services for endowments, foundations, and retirement plans, as well as financial planning and investment services for high net-worth families.

The Forma Group has a rather unique practice with four financial advisors focusing on a small group of about 100 clients. By capping the number of client relationships at 120, the Forma Group can deliver on their goal of excellent care for their clients, both institutional and families.

Tom joined Merrill Lynch in 1982 and is one of only 75 Institutional Consultants accredited by Merrill Lynch to work with Endowments, Foundations and Pension Plan accounts over \$50 million. Merrill Lynch also designated Tom one of the firm's Defined Contribution Investment Consultants, and Premier Retirement Benefits Advisor, also rarely awarded designations for work with 401(k) and other benefit services for larger employer plans.

Prior to joining Merrill Lynch Tom was the Executive Director of a non-profit agency for more than four years. Community involvement while at Merrill Lynch has included serving as President of an agency of the United Way, and President of his regional Estate & Tax Planning Council. When his Congressman created a non-profit business incubator, Tom was its first Treasurer.

Tom taught Anthropology and Sociology for several years at the University of Connecticut and Eastern Connecticut State University. He earned his B.A. cum laude at the University of Pennsylvania and his M.A. at the University of London, England.



Paul Foster, CFA
Senior Managing Director
Turner Investments

Paul D. Foster, CFA is the Global Head of Consultant Relations and Senior Marketing Director at Turner Investments. Mr. Foster is responsible for developing and strengthening our relationships with institutional consultants worldwide and providing them with necessary information about us for their clients. He joined Turner in 2011 and has 24 years of experience in client relations and business development in the investment-management industry.

Prior to joining Turner Investments, Mr. Foster was employed at Delaware Investments where he served as vice president of consultant relations. Paul was also employed with Sturdivant & Co., Inc., Oppedisano & Company, Inc., Hawkes-Randolph & Associates, Inc. Mr. Foster received his BA degree in history from Furman University and his MA from the University of Missouri. He is also a regular member of the CFA Institute and the CFA Society of Philadelphia as well as a member of AIMSE.

Turner Investments is an employee-owned investment-management firm based in Berwyn, Pennsylvania. As of June 30, 2011 the firm manages approximately \$17.7 billion in equity investments for institutions and individuals.



Kerry Galvin, CFA
Senior Consulting Analyst
Russell Investments

Kerry Galvin is a senior consulting analyst for Russell Investments' U.S. consulting business. Her primary responsibility is to provide client support for Russell products and services, including designing and developing performance and analytic reports. A strong component of her role is to educate clients in the use of Russell reporting in measuring and evaluating their investment performance. On specific client projects, she works directly with clients, consultants and other Russell business units on project specification and coordination. Kerry also works with consultants in implementing investment strategy, asset allocation and asset class structure for clients. She joined the U.S. consulting group in 2004.

Previously, Kerry worked as a sales analyst with Russell's institutional sales and services area supporting Russell's East Coast-based regional directors. Her responsibilities included researching and implementing customized sales strategies, providing information for requests for proposals, and customizing cost and performance analyses for prospective clients. She joined institutional sales and services in 1999.



Bonnie Goldsborough, CFA
Vice President
Director of Research
The Marco Consulting Group

Bonnie joined The Marco Consulting Group in 2009 and currently serves as Vice President and Director of Research. After spending her early career in Washington, D.C. as a consultant to various U.S. federal government agencies, Bonnie shifted her career focus to investment management in 1999. Bonnie began her career with Marco Consulting as Assistant Director of Research, and was promoted to Portfolio Manager of MCG's Fiduciary Services Equity Group Trust in March of 2010. In May of 2010 Bonnie was promoted to Director of Research. As the Director of Research, Bonnie continues her oversight responsibilities for the Equity Group Trust in addition to overseeing the firm's research, analytical, and due diligence process. Prior to joining MCG, Bonnie worked as an Equity Analyst at UBS Global Asset Management and at the Bank of America subsidiary Evergreen Investments. She also worked at Fidelity Management and Research Company.

Bonnie earned her M.B.A. from The Wharton School of the University of Pennsylvania, a Master of International Affairs from the School of International and Public Affairs at Columbia University, and earned her B.A. from Beloit College with honors. Bonnie is a Chartered Financial Analyst. In addition, she is a member of the CFA Society of Chicago and is Vice Chair of Women Investment Professionals.



Bruce Graham, CFA
Vice President
CAPTRUST Financial Advisors

Bruce joined CAPTRUST in 2013. He is a member of the firm's investment committee and provides investment guidance to corporate, nonprofit, and high net worth clients. Bruce has more than 30 years experience working with clients to facilitate asset allocation studies, manager searches, plan design, performance measurement, and various technical projects. He has also worked closely with many financial institutions to build both traditional and alternative investment platforms, including the design and allocation of fund of hedge funds. Bruce is a frequent speaker on investment options and plan design for Defined Benefit and Defined Contribution plans. Prior to joining Clearbrook in 1985, Bruce spent several years as an institutional investment consultant at Merrill Lynch & Co. He was also President of Shields Associates, Clearbrook's predecessor firm. He is a CFA charterholder and a member of CFA Institute and the New York Society of Security Analysts. Bruce received his BA in Economics from Bucknell University and his MBA in Finance from New York University.



Kevin Greeley
President
Greeley Communications

Kevin is the president and founder of Greeley Communications, a management consulting firm that specializes in helping individuals and organizations improve their communication strategies and skills. As a communication coach/consultant, Kevin has helped thousands with individual and team presentations, selling skills, and strategies. He has worked with many of America's top firms, including State Street Corp., Allianz Global Investors, PIMCO, Franklin Templeton Investments, Mass Mutual, Principal, Putnam Investments, Fidelity Investments, New York Life, GE Capital, Prudential Life, IBM, Eaton Vance, Mass Financial Services, Merrill Lynch and many more.

In over a quarter century of communication consulting, teaching, training, and coaching, Kevin has worked with diverse industries investment management, financial services, insurance, retirement benefits and services, legal,

political etc. from more than a hundred companies. He is considered one of the country's leading experts in the areas of business and political communications.

Prior to founding Greeley Communications, Kevin served as the New England Regional Manager and a Senior Managing Director for Communispond, Inc. He is the former Associate Dean of the Graduate School and a ten-year professor of communications at Emerson College in Boston. He holds a BS and MS from Emerson and completed three years of doctoral studies at Kent State University. Mr. Greeley resides in Arlington, MA with his wife and two children. He is an eight-term elected member of the Arlington Board of Selectmen and serves on the Board of Directors of the Arlington Boys and Girls Club, Chairman of the Maryanne Greeley Scholarship Trust and is involved with many other charitable causes. In addition to his family, Kevin's passions include golf, cooking/eating and playing ragtime piano.



Nick Guglielmo
Treasurer
Corporate Finance
Associated Press

Nick joined Associated Press (AP) in 2006 and is a member of AP's Investment Management Committee. Nick oversees all investments related to AP's global defined benefit and contribution plans. Before joining AP, Nick was with Gannett Inc. where he led Gannett's capital market activities as well as overseeing the Gannett Foundation investment portfolio and the deferred compensation plan.



Maureen Kennedy Hays
Managing Director
Principal Global Investors

Maureen joined Principal Global Investors in 2013 as a senior member of the Global Consultant Relations team. She most recently was at AXA-IM as Director of Consultant Relations and prior to that was the Director of Institutional Sales for the E&F channel at AXA Rosenberg. Previously, she spent over 5 years as a senior member of MSIM's Global Consultant Relations

team. She also held positions in sales, and as a product specialist and senior relationship manager while at Scudder, Stevens & Clark. She began her career as an Investment Analysts at GTE Investment Management and then as a Senior Investment Specialist at Buck Consultants. She has a BA, with departmental honors, from Trinity College and an MBA from the University of Connecticut. Maureen is a Registered Representative of Princi Financial Services Corporation and has passed the FINRA Series 7 and 63 examinations.



Neal Howe

Managing Director
Head of Strategy Distribution
Funds and Advisory-Americas
Barclays Funds & Advisory

Neal Howe is Managing Director,
Head of Funds and Advisory-Americas

Distribution. Neal has over 30 years experience, holding senior management roles focused on Distribution, Sales, Marketing, Client Service and Consultant Relations in addition to the overall strategic growth and development of various asset management businesses. Prior to joining Funds and Advisory-Americas, he was Managing Director with Harbert Management Corp., a Managing Director at Merrill Lynch Investment Managers, a Partner & Managing Director with Cowen & Co., a Senior Vice President with Lazard Asset Management, and a Managing Director at Schroder Ventures. He received his BS from Indiana University, Bloomington. Neal is a past Board Member and Advisor to the Robert A. Toigo Foundation and a past President and Board Member of the Association of Investment Management Sales Executives (AIMSE).



Carla Hunter

Chief Executive Officer and
Chief Investment Officer
Weizmann Global Endowment
Management Trust

Carla Hunter is the Chief Executive
Officer and Chief Investment Officer
of the Weizmann Global Endowment Management Trust. The Weizmann Trust invests on behalf of the Weizmann Institute of Science and its global affiliates. Prior to joining the Weizmann Trust in November 2002, she served as

Director of Investments and Treasury at The Museum of Modern Art in New York City. Before that, she served as Chief Financial Officer of hedge fund manager Davidson, Weil Associates and as Director of City Center of Music and Drama, Inc. which operates the David H. Koch Theater at Lincoln Center. Ms. Hunter is currently a member of the Board of Managers and Chair of the Audit Committee of the Mellon Optima Long/Short Strategy Fund LLC. Ms. Hunter became a CFA charterholder in 2000 and has been a CPA since 1979. Her professional affiliations include The CFA Institute and the New York Society of Security Analysts.

Ms. Hunter currently serves as Special Advisor to the Investment Committee for the Polish-American Freedom Foundation. She was a member and Treasurer of the Board of Governors of City Center of Music and Drama, Inc. from 1995 through 2010. She served as board member and Treasurer of the Nonprofit Coordinating Committee of New York from 1997 through 2010.



Dale Kindregan

Director
Institutional Marketing
Endowments and Foundations
Principal Global Investors

Dale is responsible for building new business relationships in the endowment and foundation channel in the US. She joined the firm in 2012. Prior to her current role, Dale served as Head of Endowment and Foundation Channel for six years at PineBridge Investments (formally called AIG Investments). Prior to this, Dale spent four years at Russell Investment Group in New York as Relationship Manager for Endowments and Foundations, and prior to that several years as VP Endowment and Foundation Sales at US Trust Company in New York and Glenmede Trust Company in Philadelphia.

Out of the twenty-seven years Dale has spent in the investment management field, seventeen years have been devoted exclusively to the E&F sector. She completed the 2-year Graduate Management Program from the University of Pennsylvania's Wharton School and received a bachelor's degree in Psychology from the

College of William and Mary. She is an affiliate member of CFA Institute. She is member of NY Society of Security Analysts, 100 Women in Hedge Funds, and Association of Investment Management Sales Executives (AIMSE).

Dale currently serves as a board member and chairs the annual benefit committee for the Jubilee Center of Hoboken Children's Educational Center. She served 16 years as a board member of the Hepatitis B Foundation and several other non-profit boards.



Alan Kosan

Senior Vice President
Head of Alpha Investment Research
Segal Rogerscasey

Mr. Kosan is the Senior Vice President, Head of Alpha Research in Segal Rogerscasey's Darien office and has over 20 years of alternative investment experience. The Alpha Investment Research Group is responsible for Fundamental/Quantitative Manager Research. He is a member of the firm's Fiduciary Investment Review Committee, which provides oversight for our fully discretionary relationships.

Prior to joining Segal Rogerscasey, Mr. Kosan was the Director, Consultant Relations and Institutional Marketing for Henderson Global Investors North America. Before Henderson, he was the head of the Alternative Investment portfolios at both the Philip Morris and United Technologies Corporation pension funds. Mr. Kosan has also worked in a variety of management positions with both real estate and private investment groups. Over the course of his career, Mr. Kosan has served as an institutional limited partner or advisor to limited partners in over 90 private equity funds representing in excess of \$1.1 billion of committed capital. He has also served on a number of private equity and real estate fund Advisory Boards.

Mr. Kosan has a BA, summa cum laude with distinction, from Boston University's College of Liberal Arts. He has a Juris Doctor degree from Emory University School of Law. He is a NASD licensed Series 7 and 63 Registered Representative. Mr. Kosan currently sits on the United Way of the Capitol Region and Connecticut Public Broadcasting, Inc. (CPTV) Endowment Investment Committees.



Chris Krein

Director of Institutional Sales
WisdomTree Asset Management

Chris is the Director of Institutional Sales at WisdomTree Asset Management and is responsible for business development, consultant relations and client service efforts in the Pension, Foundation & Endowment, and Sub-Advisory markets. Prior to joining WisdomTree, Chris was a founding Principal of ACCI, a boutique investment firm and held senior business development and management roles with Evergreen Investments and SEI. He also served as a consultant with Investment Counseling, Inc. Chris currently serves on the Board of Directors of AIMSE and Philabundance.



Amy Labanowski

Principal
Mercer Investment Consulting

Amy Labanowski is a Principal and senior investment consultant in the New York office of Mercer's Investments business. She is responsible for establishing investment objectives and strategies, conducting asset allocation studies and portfolio structuring, constructing investment lineups, developing investment policies, monitoring investment programs and conducting manager searches for corporate defined contribution and defined benefit plans. Amy is a member of the US Investment Consulting Defined Contribution Committee, US Investment Policy Committee and Stable Value Strategic Research Team. Prior to joining Mercer in 1997, she was employed by Hirschfeld, Stern, Moyer & Ross, Inc., a benefits, compensation and financial planning consulting firm, in the defined contribution group. Prior to Moyer & Ross, Amy worked in the defined contribution and participant services group for Bankers Trust Company. Amy holds a BS in business administration from the University of Vermont, where she graduated cum laude. She is a Chartered Financial Analyst (CFA) charter holder and is a member of the CFA Institute and the New York Society of Security Analysts.

Stephanie Lynch, CFA
Managing Director
Global Endowment Management

Stephanie is a co-founder of GEM. Previously, she was CIO at The Duke Endowment, the \$3.3 billion family foundation of James B. Duke, improving its portfolio ranking from 95th percentile to top quartile. She has also served as a portfolio manager at INVESCO Capital Management and Trade Street Investment Services. Stephanie is a trustee of Presbyterian Hospital Foundation and a director of Novant Asset Management Co. She is a member of the finance committee for Charlotte Country Day School and the Baby J Fund, a private foundation supporting research for pediatric cancers. She earned her B.Sc. in Finance from Florida State University and is a Chartered Financial Analyst.



Tim McAvoy
Director of Sales
DePrince, Race & Zollo, Inc.

Mr. McAvoy joined DePrince, Race & Zollo, Inc. in 2013. He is the Director of Sales for all investment disciplines. Prior to joining DePrince, Race & Zollo, Inc., Mr. McAvoy was the Director of Client Service and Marketing at Marvin & Palmer Associates, Inc. for 13 years. Prior to that, he served as the Business Director of Managed Healthcare Sales at SmithKline Beecham. Mr. McAvoy is a past Board Member and President of the Association of Investment Management Sales Executives. He holds both a Series 7 and Series 63 license from the National Association of Security Dealers. Mr. McAvoy received his Bachelors of Arts in Business Management from Pennsylvania State University.



Julie Moore
Partner
International Equity Research
Rocaton Investment Advisors, LLC

Julie Moore, Co-Head of Equity Research, is a founder and Partner of Rocaton and leads the research effort for non-U.S. developed markets and emerging markets. Julie joined Rocaton in 2002 after 5 years at Barra RogersCasey where she served as Director and Head

of International Equity Research and was previously part of a client relationship and consulting team. Julie has also served as a Portfolio Manager with Bankers Trust Company. Julie earned an M.B.A. at Amos Tuck School of Business at Dartmouth College and a B.S. in Business Administration at Skidmore College.



Chris Paoella
Managing Partner
Director of Marketing &
Consultant Relations
Perimeter Capital Management, LLC

Chris Paoella co-founded Perimeter Capital Management in 2006, an institutional investment boutique, and Perimeter Concourse Capital in 2008. He is one of the firm's Managing Partners and a member of the firm's Management Committee. He is actively involved in the firm wide strategy, operations, marketing and investor relations. Mr. Paoella brings institutional sales, marketing and management experience since 1985. Prior to 2006 he also served in senior positions with both Trusco Capital Management and Great-West Life & Annuity. Mr. Paoella is a graduate of The University of Richmond where he received a B.A. in Economics.



Michael Raso
Senior Vice President
Director of Institutional Retirement
and Subadvisory
Old Mutual Asset Management

Michael Raso is a Senior Vice President, Director of Institutional Retirement and Subadvisory at Old Mutual Asset Management. He is responsible for strategy and marketing within the retirement and subadvisory markets for the nine affiliates of Old Mutual. Prior to joining Old Mutual, Mr. Raso was a partner with Crosswind Investments, LLC where he was head of Marketing and Client Service. Previously he worked for Artisan Partners, where he was responsible for their defined contribution investment only business. Before that, he was a Senior Vice President with NATIXIS Asset Management where he oversaw the

defined contribution and subadvisory business for all fourteen affiliated money management firms. Prior to NATIXIS, he spent twelve years with Fidelity Investments in various marketing and management roles. Mr. Raso holds a BA from Providence College.

He is FINRA Series 10, 9, 7, 6 and 63 licensed. He resides in Hingham, Massachusetts with his wife and four daughters.



Peter Ricchiuti

Professor
Tulane University's Freeman
School of Business

Peter Ricchiuti (Ri-Shooty) is the business school professor you wish you had back in college! He teaches

courses on the financial markets at Tulane University's Freeman School of Business. His insight and humor have twice made him the school's top professor.

Peter started his career with the investment firm of Kidder Peabody and later managed over three billion dollars as the assistant treasurer for the state of Louisiana. In 1993 he founded Tulane's highly acclaimed BURKENROAD REPORTS stock research program.

He has been featured on CNN and CNBC as well as in The New York Times, BARRON'S, The Washington Post and The Wall Street Journal. Over the past twenty years Peter has addressed hundreds of groups in 47 states and several countries. He has presented to a wide variety of audiences including workshops for the New Orleans Saints.



David Richardson, CFA
Managing Director
Head of Business Development
and Client Service
Impax Asset Management (US)

David is the Head of Business Development and Client Service, North

America for Impax Asset Management, a leading global equity specialist focused on long-term macroeconomic trends that are driving increased demand for resource

optimization and efficiency. Since 1998, Impax has been successfully investing in companies providing innovative solutions in energy efficiency, alternative energy, resource recovery, water, food, agriculture, and forestry markets through both listed and private equity strategies.

David joined Impax in August 2012 from Global Energy Investors where he was a Managing Partner. He previously co-founded and served for 22 years as Managing Director of Business Development at Dwight Asset Management Company (since acquired by Goldman Sachs Asset Management). Prior to Dwight, David headed Project Development at Mark Technologies Corporation and successfully developed a number of large scale wind energy projects. David received his BS in Mechanical Engineering from the University of California, is licensed as a Civil Engineer, and has a CFA



Kurt Schoknecht

Managing Director
Investment Management
Greenwich Associates

Kurt H. Schoknecht, Managing Director, consults with the firm's investment management clients in

North America and other markets. Kurt has over 30 years of experience in financial services and founded his own strategic advisory firm The Cardinal Partners. Previously, he was Head of Global Strategic Initiatives for the iShares business at BlackRock. For nine years, Kurt was the Head of International Funds and Sub-Advisory business at AllianceBernstein with offices in 21 countries. Before that, he ran the internal consulting group at Bankers Trust/Deutsche Bank and worked as a strategic consultant in the FIG practice at McKinsey. Kurt began his career at Citibank, living and working in Europe for six years. He received both his BA and MBA degrees from Stanford University.

**Tom Shingler**

Vice President
Fund Sponsor Consulting
Callan Associates

Thomas H. Shingler is a Vice President in Callan's New Jersey Fund Sponsor Consulting office, and works with a variety of fund sponsor clients, including public and multi-employer plans, corporate defined benefit and defined contribution plans, endowments and foundations, and insurance companies. His responsibilities include client service, investment manager reviews, performance measurement, research and continuing education, business development and coordination of special client proposals and requests. Tom is a member of Callan's Manager Search Committee.

Prior to joining Callan, Tom was co-head of consulting at Orion Consultants, a consulting firm serving the fixed income divisions of global investment banks, where he worked for 11 years. He was responsible for managing several client relationships, new business development, and leading the firm's market research studies.

Tom earned a BA in History from Princeton University and an MBA from the University of Pennsylvania Wharton School.

**Travis Shore**

Investment Director
Alfred P. Sloan Foundation

Travis Shore serves as Investment Director for the Alfred P. Sloan Foundation and is a generalist investor across asset classes. Prior to joining the Foundation, he served as Director of Investments for New York University and Director of Hedged Strategies for University of Florida Investment Corporation (UFICO), where he was responsible for hedge fund investments, investment strategy, and direct investments. He previously worked for Wachovia Corporation as Vice President/Director in Alternative Strategies and Associate Director in Manager Due Diligence. Travis began his career with Merrill Lynch Credit Corporation. He holds a Bachelor of Business Administration degree in Banking and Finance from the University of North Florida and holds the Chartered Financial Analyst designation.

**Donald Steinbrugge, CFA**

Managing Member
Agecroft Partners, LLC

Don is Chairman of Agecroft Partners, a global consulting and third party marketing firm for hedge funds. Agecroft Partners has won 16 Third Party Marketer of the Year awards. Don is a frequent guest on business television including Bloomberg Television, Fox Business News and Reuters Insider. In addition, he has been quoted in hundreds of articles relative to the hedge fund industry and institutional investors.

Highlighting Don's 28 years of experience in the investment management industry is having been the head of sales for both one of the world's largest hedge fund organizations and institutional investment management firms. Don was a founding principal of Andor Capital Management, which was formed when he and a number of his associates spun out of Pequot Capital Management. At Andor he was Head of Sales, Marketing, and Client Service and was a member of the firm's Operating Committee. When he left Andor, the firm ranked as the 2nd largest hedge fund firm in the world. Previous to Pequot, Don was a Managing Director and Head of Institutional Sales for Merrill Lynch Investment Managers (now part of BlackRock). At that time Merrill ranked as the 3rd largest investment manager in the world. Previously, Don was Head of Institutional Sales for NationsBank (now Bank of America Capital Management).

Don is also a member of the Investment Committees for The City of Richmond Retirement System, The Science Museum of Virginia Endowment Fund and The Richmond Sports Backers Scholarship Fund. He is also a member of the Board of Directors of the Hedge Fund Association, Lewis Ginter Botanical Gardens and the University of Richmond's Robins School of Business. In addition, he is a former two term Board of Directors member of The Richmond Ballet (The State Ballet of Virginia) and AIMSE.

**Steve Turi**

Managing Partner &
Chief Investment Officer
SkyView Investment Advisors, LLC

Mr. Turi, Co-founding Managing Partner and Chief Investment Officer is primarily responsible for the day-to-day management of investment activities. He is head of the firm's Investment Management Committee. Prior to working at SkyView, Mr. Turi was one of the original founders of Riverview Alternative Investment Advisors since its inception in 1999. Prior to joining Riverview, Mr. Turi was a Director at Barclays Capital where he managed hedge fund relationships across asset classes. Prior to joining Barclays, Mr. Turi was a senior member of the Global Equity Finance Team and co-head of Global Equity Derivatives & Program Trading at Daiwa Securities America. Prior to Daiwa, Mr. Turi worked for IBM in the Wall Street Securities Branch. Prior to IBM, Mr. Turi worked for Bell Atlantic Corporation as part of the Accelerated Management Development Program. Mr. Turi received an MBA in Finance from the Stern School of Business at New York University and a B.S. in Electrical Engineering from New Jersey Institute of Technology. Mr. Turi serves on the board of 180 Turning Lives Around, a non-profit organization dedicated to helping children, women and families dealing with domestic violence. He also serves on the board of the 2nd Floor Youth Helpline and he serves on the board to the Count Basie Theatre Foundation.

**Edward Urban**, CFA

Vice President
Meketa Investment Group

Mr. Urban joined Meketa Investment Group in 2009 and has more than a decade of institutional investment experience. His consulting work includes investment policy design, strategic asset allocation modeling, investment education, and investment manager analysis. Mr. Urban is a member of the firm's Asset Allocation Working Group.

Prior to joining the firm, he led an equity research team generating media and entertainment sector research for Bear, Stearns & Co. Previously, he worked as a summer

associate for a media and telecommunications-focused hedge fund and as a senior performance measurement analyst with Russell/Mellon Analytical Services.

Mr. Urban earned an MBA from the Yale School of Management and a BA from Eastern Nazarene College. He holds the Chartered Financial Analyst designation from the CFA Institute and is a member of the Boston SeSecurity Analysts Society.

**Kevin Vandolder**, CFA

Partner
National DC Client Practice Leader
Hewitt EnnisKnupp

Kevin Vandolder, partner, serves as a primary consultant and manages consulting assignments for a select number of Hewitt EnnisKnupp retainer and project clients. Kevin is the firm's DC Client Practice Leader. Before joining Hewitt EnnisKnupp in 1996, Kevin was in the corporate finance group of the \$9 billion Westcoast Energy group of companies and had previously served in the Canadian Navy (reserve) and Presbyterian World Service. Kevin holds an MBA in Strategy and Leadership from NYU Stern and Honors B.Comm. degree in finance from the Odette Business School at the University of Windsor. Kevin is a CFA charter holder and active member of the CFA Society of Austin — previously serving as President and Treasurer of the CFA Society of Chicago. Kevin remains active on CFA Institute committees while serving many years as a grader for the Chartered Financial Analyst examination.

Kevin has also served as an adjunct faculty member at DePaul and Northwestern University while serving on industry organizations such as the PSCA/401(K) Council's Legal and Legislative Committee, Executive Committee and founding member of the Defined Contribution Institutional Investment Association and chair of its Investment Policy Committee. Kevin continues to be quoted in the industry press including Money Management Letter, Fund Fire, and Pension & Investments and remains active in speaking at industry conferences.



Matthew Wright, CFA
Founder and President
Disciplina Group, LLC

Matthew W. Wright, CFA is the former Vice Chancellor for Investments and Chief Investment Officer of Vanderbilt University. In his position, which he held from 2007 – 2012, he led a twenty person team responsible for investment oversight of the university's \$3.9 billion long term investment portfolio, which includes the university endowment.

Prior to joining Vanderbilt University in the summer of 2007, Matthew was the Director of Investments at Emory University for over six years. While at Emory his primary duties included implementation of asset allocation policies, investment strategy, manager selection, and internal management within Emory's long-term investment portfolio of \$5.0 billion. Prior to joining Emory, Matthew worked for Bank of America Capital Management's

Quantitative Strategies Group as a portfolio manager and Xerox Corporation's Trust Investments department as an investment analyst.

Matthew is a graduate of Seton Hall University (1989) with a bachelor's degree in Finance and holds an M.B.A. from the University of Rochester (1991). He is also a member of the CFA Institute, Chicago Quantitative Alliance, and Trustee and Investment Committee Chair for The Ensworth School in Nashville, Tennessee.

Throughout his career Matthew has been a featured speaker, moderator and panelist at industry conferences such as NMS Management, Institutional Investor and others. In addition, he has been featured in local and national publications regarding institutional investing and investment risk management. In 2006, he was chosen as a featured participant in the Chicago Mercantile Exchange Group's (CME) global advertisement campaign, which appeared in periodicals such as Barron's, the Wall Street Journal, USA Today and Institutional Investor magazine.

A high-angle, wide shot of a dense city skyline, likely New York City, featuring numerous skyscrapers and buildings. The image is tinted with a blue and orange color scheme. The text "CONVERGENCE. NOW." is overlaid on the left side of the image. "CONVERGENCE." is in blue, all-caps, sans-serif font, and "NOW." is in a larger, orange, all-caps, sans-serif font.

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Callan Founded in 1973, Callan Associates is one of the largest independently-owned investment consulting firms in the country. Headquartered in San Francisco, CA, the firm provides research, education, decision support and advice to a broad array of institutional investors through four distinct lines of business: Fund Sponsor Consulting, Independent Adviser Group, Institutional Consulting Group, and the Trust Advisory Group. Callan employs more than 175 people and maintains four regional offices located in Denver, Chicago, Atlanta and Summit, NJ. For more information, visit www.callan.com.

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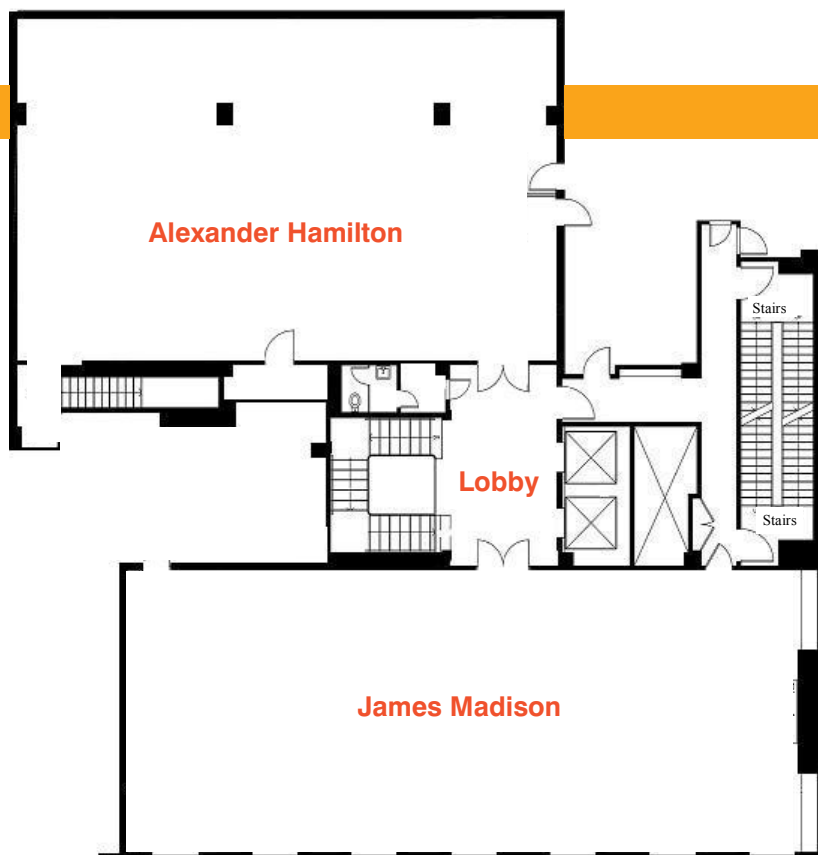
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