

Creating a Path to
SUCCESS

A STEP

AHEAD



AIMSE

41ST ANNUAL MARKETING & SALES CONFERENCE

APRIL 29 – MAY 1, 2018 • NATIONAL DORAL MIAMI • MIAMI FL

CONFERENCE PROGRAM





AIMSE 41ST ANNUAL MARKETING & SALES CONFERENCE

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DEAR AIMSE MEMBERS:

Thank you for being part of the 41th AIMSE Annual Marketing & Sales Conference. We are thrilled and honored to have created an educational, impactful, and memorable program for you. We truly appreciate your attendance and look forward to seeing everyone interact, share ideas, learn, and have fun.

Our theme this year echoes AIMSE's mission of **Creating a Path to SUCCESS**. From the keynote speakers to the asset allocators to your peers, we encourage you to take advantage of all of the knowledge, experience, and backgrounds in attendance and in the spirit of AIMSE, help each other succeed. It ain't easy out there and we hope these few days will help you gain that extra edge.

The program contains an impressive line-up of **over 45 leading asset allocators**, a wide variety of investment consulting representatives with sessions diversified across channels, subject matters, and traditional vs. alternative asset classes. A few highlights:

- Keynote speakers Steve Mazan, an Emmy award-winning writer, author, and comedian, and IN-Q, a national poetry slam champion and entertainer. You are assured two entertaining, inspiring keynotes that will have you rethink your approach to work and life.
- Senior consulting firm representatives from over a dozen different firms, including the ever-popular consultant roundtable session.
- A first this year, we welcome members of the CIO Magazine's Forty under 40 to our conference, as well as several other plan sponsor panels with representatives from leading institutions.
- Breakout sessions focused on specific channels (Consultant vs. Direct) and (Traditional vs. Alternative) as well as personal and corporate development opportunities.

Another first this year, will include the inaugural AIMSE/TOIGO Foundation partnership introducing our first two scholarship recipients. There really is something for everyone. We welcome your feedback and participation.

As always, we have partnered with industry leading vendors who have developed robust and intelligent tools to help sales executives succeed. They would love to meet you and find out how they can help your firms succeed in this increasingly competitive market place.

Of course, it wouldn't be an AIMSE conference if we didn't include fun events to help foster new relationships and strengthen existing ones. Consider signing up for golf, tennis, or volleyball to expand your networking opportunities!

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

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

Sincerely,

Holly Verdeyen

Russell Investments
Conference Co-Chair

Gus Catsavis

Pinnacle Asset Management, L.P.
Conference Co-Chair

AIMSE BOARD OF DIRECTORS 2017-2018

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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Co-Chair

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First State Investments
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CANADIAN COMMITTEE

Kimberley Woolverton, CFA

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Chair

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Millennium Management LLC
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Chris Paoletta

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Chris Rae

Elevation Marketing Advisory

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Clarkston Capital Partners
Chair

Tim Hill

Q – Emerging Markets Corp.
Co-Chair

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Derek Tubbs, CornerCap Investment Counsel

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Gus Catsavis, Pinnacle Asset Management, L.P.

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Matt Pawlak, Dimensional Fund Advisors
Mark Robertson, Proprietary Capital, LLC

TORONTO & MONTREAL

Jay Wiltshire, Greystone Managed Investments, Inc.

KEYNOTE SPEAKERS

MONDAY, APRIL 30

8:15-9:15 am

Keynote Presentation by Steve Mazan
Someday Isn't on the Calendar



TUESDAY, MAY 1

8:00-9:00 am

Keynote Presentation by National Poetry Slam Champion IN-Q

Question Everything with IN-Q: A Journey into the Heart, Mind and Spirit Through Poetry



SCHEDULE AT A GLANCE

Location	Time	Event
SUNDAY, APRIL 29		
Imperial Ballroom	7:00-8:00 am	Golf Tournament Registration & Breakfast
National Doral Golf Club Red Tiger Course	8:00 am-12:00 pm	Golf Tournament
National Doral Golf Club	10:00-11:30 am	Golf Clinic
Imperial Ballroom	12:00-1:30 pm	Luncheon for Golf Tournament and Clinic Participants
Majestic Ballroom	1:30-5:30 pm	Boot Camp
Galleria	4:00-8:00 pm	Conference Registration
Living Room	6:00-6:30 pm	Newcomer & Mentor Reception
White & Gold Ballroom	6:30-9:30 pm	Welcome & Exhibitor Reception
MONDAY, APRIL 30		
Galleria	7:00 AM- 3:30 PM	Conference Registration
White & Gold Ballroom	7:00-8:00 AM	Breakfast with Exhibitors
Crystal Ballroom	8:00-8:15 AM	AIMSE President's Welcome
Crystal Ballroom	8:15-9:15 AM	Keynote Presentation by Steve Mazan
Crystal Ballroom	9:15-9:45 AM	A Word From Our Partners
Crystal Ballroom	9:45-10:45 AM	State of the State – A Conversation with Investment Consulting Leaders
White & Gold Ballroom	10:45-11:00 AM	Refreshment Break with Exhibitors
	11:00-11:50 AM	CONCURRENT BREAKOUT SESSIONS
Ivanka B	TRACK 1:	TRADITIONAL INVESTMENTS The Past, Present, And Future Of Corporate Pension Plans
Ivanka C	TRACK 2:	ALTERNATIVES The New Order of Alternative Investments
Ivanka A	TRACK 3:	PROFESSIONAL DEVELOPMENT Strategic Selling: Expanding Into New Markets
White & Gold Ballroom	12:00 -1:00 PM	AIMSE/TOIGO FOUNDATION: Bringing Diversity to Life
Crystal Ballroom	1:10-2:10 PM	Meet the New Guard: CIO Magazine's "40 Under Forty"
	2:10-2:40 PM	Refreshment Break with Exhibitors
White & Gold Ballroom	2:45 – 3:45 PM	CONCURRENT BREAKOUT SESSIONS
Ivanka B	TRACK 1:	TRADITIONAL INVESTMENTS 9 Years into a Bull Market...Now What?

Location	Time	Event
Ivanka C	TRACK 2:	ALTERNATIVES Where are We in the Opportunity/Capital Cycle Among Alternatives: Hedge Funds, Private Credit, Private Real Assets and Private Equity
Ivanka A	TRACK 3:	PROFESSIONAL DEVELOPMENT Strategic Selling: Managing the New Sales Cycle and Internal Dynamics
	4:30-6:45 PM	Optional Outdoor Activities
Tennis Courts	-	Tennis Tournament
Imperial Lawn	-	Volleyball Tournament
Living Room	7:30-8:00 PM	Cocktail Reception
Ivanka Ballroom	8:00-11:00 PM	Dinner & AIMSE Lothrop Award Presentation

TUESDAY, MAY 1

Galleria	7:00 am-1:30 pm	Conference Registration
White & Gold Ballroom	7:00-8:00 am	Breakfast with Exhibitors & AIMSE Annual Business Meeting
Crystal Ballroom	8:00-9:00 am	Keynote Presentation by National Poetry Slam Champion IN-Q
Crystal Ballroom	9:00 - 10:00 AM	Re-Thinking Distribution: Comparing Distribution Models and Strategies of Asset Management Firms
White & Gold Ballroom	10:00-10:20 AM	Refreshment Break with Exhibitors
	10:20-11:40 AM	CONCURRENT BREAKOUT SESSIONS – MEET THE ALLOCATORS PARTS I AND II <i>Please note each session is 40 minutes in length beginning at 10:20 and repeating at 11:00. Attendees are encouraged to select one session per time period.</i>
Ivanka A	SESSION 1:	The Changing Landscape of Healthcare
Ivanka B	SESSION 2:	Endowments and Foundations Forge a New Model
Ivanka C	SESSION 3:	2018 OCIO Trends: The Future is Here
Crystal Ballroom	11:50 AM - 1:20 PM	Consultant Roundtables
White & Gold Ballroom	1:20-2:20 PM	A Global Perspective on Institutional Investor Behavior

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

EXTENDED SCHEDULE

SUNDAY, APRIL 29

7:00–8:00 am

Imperial Ballroom

Golf Tournament Registration & Breakfast

8:00 am–12:00 pm

National Doral Golf Club
Red Tiger Course

Golf Tournament | National Doral Golf Club Red Tiger Course

10:00–11:30 am

National Doral Golf Club

Golf Clinic

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

12:00–1:30 pm

Imperial Ballroom

Luncheon for Golf Tournament and Clinic Participants

1:30–5:30 pm

Majestic Ballroom

AIMSE Boot Camp

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

Topics will include:

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

MODERATORS

Michael Gillis

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

Chris Rae

Managing Director
Elevation Marketing Advisory

4:00–8:00 pm

Galleria

Conference Registration

6:00–6:30 pm

Living Room

Newcomer & Mentor Reception

6:30–9:30 pm

White & Gold Ballroom

Welcome & Exhibitor Reception

MONDAY, APRIL 30

7:00 am–3:30 pm

Galleria

Conference Registration

7:00–8:00 am

White & Gold Ballroom

Breakfast with Exhibitors

8:00–8:15 am

Crystal Ballroom

AIMSE President's Welcome

8:15–9:15 am

Crystal Ballroom

KEYNOTE PRESENTATION BY **STEVE MAZAN**

Someday Isn't on the Calendar

Emmy Winning-Writer and Comedian Steve Mazan talks about his wake-up call for life. A stage 4 cancer diagnosis. Wait, wait! Steve knows what you're thinking, "Oh no, another sappy, sad story about a disease." Don't worry, he hates those too. Instead, Steve uses his decades of stand-up experience to weave a hilarious and motivational talk that will leave you inspired and holding your side. From laughing, your side will be fine, don't worry.

9:15–9:45 am

Crystal Ballroom

A Word from our Partners

9:45–10:45 am

Crystal Ballroom

STATE OF THE STATE – A CONVERSATION WITH INVESTMENT CONSULTING LEADERS

You won't want to miss this open and honest dialogue with luminaries who are shaping the direction of the consulting industry. In this session we bring together leaders and practitioners from influential consulting firms to discuss the current state of the consulting business and how it will continue to evolve in the coming years including the impact of consolidation, OCIO, money management, staffing, and fees. We'll discuss, among a variety of topics, how the changing consulting landscape will impact the investment management community and how we work with consultants. Which client bases will grow or shrink in the coming decade? How will the role of active, passive, ETFs, alternatives continue to evolve? And of course, we want to address all of your burning questions for these influential leaders.

MODERATOR

P. Mackenzie Hurd, CFA

Managing Director, Consultant Relations

Jennison Associates LLC

SPEAKERS

James Callahan, CFA

President

Callan LLC

Russ Ivinjack

Senior Partner

Aon Hewitt

Rob Palmeri, CFA

Director of East Coast Consulting, Head of Defined Contribution Solutions
RVK, Inc.

10:45–11:00 am

White & Gold Ballroom

Refreshment Break with Exhibitors

11:00–11:50 am**CONCURRENT BREAKOUT SESSIONS****TRACK 1 – TRADITIONAL INVESTMENTS: THE PAST, PRESENT AND FUTURE OF CORPORATE PENSION PLANS**

Ivanka B

The defined benefit plans of corporations were once the primary retirement vehicle for many Americans. The interest rate environment we now live in has come full circle from the interest rate levels we witnessed in the 1950's. But a lot has changed since that time for corporate defined benefit plans. Our panelists will discuss how corporate DB plans have evolved over time and what changes they expect in the future. We will evaluate the rise of defined contribution plans and the declining role of DB plans to determine if this transition has benefited most retirees. We will also explore the present day problems pension plans face, and how they are tackling these challenges, while considering the future impact this will have on DB plans. How are pension investment professionals managing their liabilities in the midst of one of the longest bull markets coupled with the uncertainty surrounding the direction and future levels of interest rates? How have pension plans partnered with investment managers and consultants to design and implement an effective glide path? What role will OCIO consultants play in solving the problems for multi-billion dollar corporate pension plans? Please join us for an in-depth discussion of these current day issues facing corporate pensions, with a historical perspective and an eye on the future.

MODERATOR**Greg Bauer, CFA, CAIA**

Director, Institutional Services
Parametric Portfolio Associates

SPEAKERS**James Goodwin**

Director, Retirement Plans
US Foods

Celeste Reese

Treasury Manager, Retirement Assets
Celanese

Brett Taylor

Director, Global Investments (Former)
Coca-Cola Company

Michael Tudor, CFA

Principal Investment Analyst
NextEra Energy

TRACK 2: ALTERNATIVES – THE NEW ORDER OF ALTERNATIVE INVESTMENTS

Ivanka C

This session will discuss the dynamically shifting world of alternatives. We will cover what investments fall under the scope of “alternatives” today and what role they will play in portfolios over the next ten years and beyond. Have investors modified their target allocations or carved out allocations to new opportunities? How are allocators aligning their internal resources and staff to cover the extensive range of alternative offerings? In the wake of many hedge funds struggling to meet their objectives, are investors maintaining exposure or shifting to other areas to try and achieve similar outcomes? How do investors frame the Illiquidity premium for different kinds of illiquid strategies?

MODERATOR

Kristin Fenik, CFA

Managing Director
ArrowMark Partners

SPEAKERS

Panayiotis Lambropoulos, CFA, CAIA, FRM

Portfolio Manager – Hedge Funds
Employees Retirement System of Texas

Ken Lee

Director of Investments
Carnegie Corporation of New York

Ken Souza

Investment Director
University of South Florida

Robert Thompson, CFA

Senior Portfolio Manager, Credit
UPS Group Trust

TRACK 3: PROFESSIONAL DEVELOPMENT – STRATEGIC SELLING: EXPANDING INTO NEW MARKETS

Ivanka A

Is your Firm interested in stepping strongly into a new distribution strategy. How do you best educate yourself and firm on the current issues and opportunities? What are the key metrics? How do you sensitize yourself on the marketplace dynamics and challenges?

This session will focus upon these questions utilizing a case study format with real life practical examples of success and opportunities for improvement from a panel of seasoned sales professionals, clients, and prospects

MODERATOR

Dick Hoag

Partner
Corinthian Cove Consulting, LLC

SPEAKERS

T. Neil Bathon

Managing Partner
FUSE Research Network

Paul Ferro

Investment Consultant
Curcio Webb

Steve Kneeley

President & Chief Executive Officer
Driehaus Capital Management

Greg Weissman

Consultant Relations Director
Putnam Investments

12:00 -1:00 pm

White & Gold Ballroom

AIMSE/TOIGO FOUNDATION: BRINGING DIVERSITY TO LIFE

TOIGO Foundation and AIMSE know that organizations benefit when diverse teams work together to solve complex challenges. Active engagement by women and minorities in asset management will lead to more robust decision-making and drive economic growth—preparing professionals to lead this change is TOIGO's goal. Learn how TOIGO is achieving meaningful inclusion of historically underrepresented talent in our industry and how you can be more involved. Hear from current TOIGO Fellows who were awarded AIMSE scholarships about their career paths, successes, and challenges. Advancing the careers of these talented professionals will change our collective future. AIMSE is excited to partner with TOIGO and more can be done. At this lunch, take one step closer to your engagement in driving this change.

SPEAKER

Toni Cornelius

Senior Program Consultant
Toigo Foundation

1:10 -2:10 pm

Crystal Ballroom

MEET THE NEW GUARD: CIO MAGAZINE'S "40 UNDER FORTY"

What do all the speakers in this session have in common? They've all earned a coveted spot on the "40 Under Forty" list of asset owners this year, compiled by Chief Investment Officer Magazine, in recognition of the mark they've made on their organizations early in their careers. This session provides a unique opportunity for several of these influential young leaders to come together to share their perspectives. You'll hear from these rising stars about what they attribute their early successes to and how they will impact their organizations and the investment community at large for years to come.

MODERATOR

Mark Robertson

Director of Business Development
Proprietary Capital, LLC

SPEAKERS

Elizabeth Burton, CAIA

Managing Director Quantitative Strategies Group
Maryland State Retirement and Pension System

Erik Carleton, CFA, CAIA

Director of Pension Investments
Textron Inc.

Tishawna Clyburn

Senior Investment Analyst
Prudential Financial, Inc.

Matt Sherwood

Senior Investment Manager
MMBB Financial Services

Christophe Truong, CFA

Manager, Investments
Air Canada Pension Investments

Refreshment Break with Exhibitors

2:10-2:40 pm

White & Gold Ballroom

2:45–3:45 pm

CONCURRENT BREAKOUT SESSIONS

TRACK 1: TRADITIONAL INVESTMENTS – 9 YEARS INTO A BULL MARKET...NOW WHAT?

Ivanka B

We are 9 years into an equity bull market. Bond yields have been falling for the past 35 years. Where do we go from here? How can investors prepare their portfolios for the next ten years? Listen to our panel of industry-leading consultants share their perspectives on asset allocation, what they are advising clients and where they think the money will flow in 2018 and beyond. Participate in an active Q&A session.

MODERATOR

Rachel Serna

Director, Consultant Relations
Lord, Abnett & Co. LLC

SPEAKERS

Ryan Anderson

Managing Director
Pavilion Advisory Group Ltd.

Chris Levell, ASA, CFA, CAIA

Partner, Client Strategy
NEPC

Matthew Maleri

Partner
Rocaton Investment Advisors

Geoff Strotman, CFA

Vice President, Alpha Research
Segal Marco Advisors

TRACK 2: ALTERNATIVES – WHERE ARE WE IN THE OPPORTUNITY/CAPITAL CYCLE AMONG ALTERNATIVES: HEDGE FUNDS, PRIVATE CREDIT, PRIVATE REAL ASSETS AND PRIVATE EQUITY

Ivanka C

Alternative Boom or Bust? With a prolonged economic expansion, record fundraising in private strategies and renewed interest in hedge funds, how do consultants advise their clients on identifying investment opportunities and meeting their goals while avoiding bubbles? Join us as we explore the leading topics among hedge funds, private credit, private real assets, and private equity strategies facing our panel of Alternative Investment Consultants today.

MODERATOR

Tony Buscemi

Partner
Gallatin Capital LLC

SPEAKERS

Mark Doherty, CFA

Managing Principal, Head of Hedge Funds
PivotalPath

Reid Smith

Principal, Head of Private Equity
Mercer

Tod Trabocco, CFA

Managing Director, Head of Private Debt
Cambridge Associates

Mark Williams

Managing Director, Head of Private Real Assets
Cliffwater

TRACK 3: PROFESSIONAL DEVELOPMENT – STRATEGIC SELLING: MANAGING THE NEW SALES CYCLE AND INTERNAL DYNAMICS

Ivanka A

Now that your firm is expanding into a new market, how do you manage the complex dynamics to developing strategic and tactical plans for success? How do you manage the internal and client/prospect/consultant “dance”? How can you achieve profitable growth through competitive differentiation? Listen to how two major plan sponsors and a distribution professional think through issues to help YOU become a trusted advisor both within and outside your firm.

MODERATOR

Mark Sullivan

Partner, Head of Client Service & Marketing
Bridgeway Capital Management

SPEAKERS

Raudline Etienne

Founder & Managing Partner
Daraja Capital

Deken Palmer

Director
CEB, Now Gartner

Steven Smith

Administrator
West Virginia Laborers Trust Funds

4:30–6:45 pm

Tennis Courts
Imperial Lawn

Optional Outdoor Activities

- ♦ Tennis Tournament
- ♦ Volleyball Tournament

7:30–8:00 pm

Living Room

Cocktail Reception

8:00–11:00 pm

Ivanka Ballroom

DINNER & AIMSE LOTHROP AWARD PRESENTATION

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

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

LOTHROP AWARD WINNERS

James Manley, Jim Manley Associates

John Sieter, Capital Guardian Trust

Sharon Hough, Pequot Capital

Michael Fisher, Barclays Global

Victor Zollo, DePrince, Race & Zollo, Inc.

Dick Graf, Corinthian Cove Consulting

Jerry Devore, Atlanta Capital Management

Frank Minard, XT Capital Partners

Eugene Waldron, Capital Guardian Trust Company

James Wood, JRW Partners

Obie McKenzie, BlackRock

John “Rick” Rockwell, T. Rowe Price

Marlis S. Fritz, AXA Rosenberg Investment Management

Dick Hoag, Corinthian Cove Consulting

Neal Howe, Welton Investment Partners

Tim McAvoy, Coho Partners

Jim Skesavage, Atlanta Capital Management

Larry Pokora, Tortoise Capital

TUESDAY, MAY 1

7:00 am–1:00 pm

Galleria

Conference Registration

7:00–8:00 am

White & Gold Ballroom

Breakfast with Exhibitors & AIMSE Annual Business Meeting

8:00–9:00 am

Crystal Ballroom

KEYNOTE PRESENTATION BY NATIONAL POETRY SLAM CHAMPION– **IN-Q**

Question Everything with IN-Q: A Journey into the Heart, Mind and Spirit through Poetry

World-renowned poet IN-Q has performed for everyone from Oprah Winfrey to Barack Obama, TED Talk audiences and Fortune 500 executives. Through his thought-provok-

ing and inspiring performance, IN-Q will entertain, inspire, and challenge you to look deeper into your human experience and to ask questions about your life, your environment, and the world at large.

9:00–10:00 am

Crystal Ballroom

RE-THINKING DISTRIBUTION: COMPARING DISTRIBUTION MODELS AND STRATEGIES OF ASSET MANAGEMENT FIRMS

In order to remain relevant, Managers have been forced to find their “edge”, as the competitive landscape grows ever more challenging. CaseyQuirk will provide an overview of the asset management business and operating environment, discuss key trends affecting distribution leaders, as well as interview AIMSE Emeritus Board Members panelists that highlights the initiatives that have been successfully implemented at their respective firms.

MODERATOR

Kevin Quirk

Principal

CaseyQuirk by Deloitte

SPEAKERS

Joanne Hickman Dodd

Senior Vice President, Relationship Manager

Capital Group

Steve Dunn

Executive Vice President

Cohen & Steers Capital Management Inc.

Chris Krein

Managing Director

Artisan Partners, Limited Partnership

Laura Pollock

Founding Partner

Third Street Partners

10:00-10:20 am

White & Gold Ballroom

Refreshment Break with Exhibitors

10:20-11:00 am

CONCURRENT BREAKOUT SESSIONS – MEET THE ALLOCATORS PART I

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

Session 1: The Changing Landscape of Healthcare

Ivanka A

Healthcare institutions represent an evolving distribution channel for asset managers. The healthcare landscape continues to change due to a variety of reasons including increased M&A activity, new regulations and the effect of data. The panel will consist of a well-rounded group of investment professionals from health organizations to consultants with a focus on the space. The following are topics we plan to cover:

- Ideal structure for strategic partnerships between allocators and asset managers
- AHCA and its potential implications on various hospital and healthcare plans
- Whether healthcare plans constitute as ERISA and why
- Solvency of healthcare plans
- Changing landscape due to increased M&A activity
- How plans leverage resources among different groups with various pools of assets
- How data can affect the financial sufficiency of healthcare organizations

MODERATOR

Heather Beatty

Vice President

First Eagle Investment Management, LLC

SPEAKERS

Leslie Lenzo, CFA

Chief Investment Officer

Advocate Health Care

Robert Kowalski

Director of Investments

Beaumont Health

David Smith, CFA

Managing Partner

Marquette Associates

Session 2: Endowments and Foundations Forge a New Model

Ivanka B

Hear directly from prominent leaders in the Endowment and Foundation community as speakers share insights into the changing nature of capturing alpha in their portfolios, choosing money managers, and investing responsibility. We will debate the role of illiquid assets and alternatives, discuss where to find growth in the global economy, and explore changes on the horizon.

MODERATOR

Carolyn Patton, CFA

Head of Distribution Americas

First State Investments

SPEAKERS

Deborah Christie, CFA

Managing Director

Cambridge Associates

Robert Russell

Portfolio Manager
Formerly Harvard Management Company

Catherine Ulozas

Chief Investment Officer, Vice President
Drexel University

Mark Waite

Director, Endowment Investments
University of Utah

Session 3: 2018 OCIO Trends: The Future is Here

Ivanka C

As the OCIO market continues to grow at double digit rates, OCIO assets under management are predicted to reach \$2.3 Trillion by Q1 2022 according to a research report produced by Cerulli Associates. Where is that money coming from and where is it going? How is it being allocated? How do investment firms navigate the research and selection process? How will it affect larger investment firms vs boutiques? Clearly it is increasingly important to stay on top of these shifts and understand how it is evolving. Join us for a panel discussing the latest OCIO trends as seen from an OCIO provider, two OCIO search firms, and a corporate plan sponsor considering OCIO.

MODERATOR**Ami Fox**

Marketing & Client Service
DePrince, Race & Zollo, Inc.

SPEAKERS**C. Wes Burton, Jr.**

Vice President - Treasury, Tax & Information Services
Vulcan Materials Company

Maritza Martinez, CAIA

Associate Consultant
RVK, Inc.

Paul Ferro

Investment Consultant
Curcio Webb

Dr. Amita Schultes

Managing Director, Asset Management
Perella Weinberg Partners

11:00 am–11:40 am

CONCURRENT BREAKOUT SESSIONS - MEET THE ALLOCATORS PART II

Session 1: The Changing Landscape of Healthcare

Ivanka A

Session 2: Endowments and Foundations Forge a New Model

Ivanka B

Session 3: 2018 OCIO Trends: The Future is Here

Ivanka C

11:50 -1:20 pm

Crystal Ballroom

CONSULTANT ROUNDTABLES

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

MODERATORS

Matt Pawlak

Vice President
Dimensional Fund Advisors

Keith Wosneski

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

SPEAKERS

Carolyn Carollo

Managing Director
Cardinal Investment Advisors

Ramon Gonzalez, CFA

Vice President
Wilshire Associates

Sally Haskins

Senior Vice President, Real Assets Consulting
Callan LLC

David Hyman, CFA

Partner, Wealth Manager Solutions US Segment Leader
Mercer

Aaron Lally, CFA, CAIA, CIPM

Executive Vice President
Meketa Investment Group, Inc.

Brad Long, CFA

Principal, Research Director – Global Public Markets
DiMeo Schneider & Associates

Jeffrey Nipp, CFA, CAIA

Senior Investment Consultant
Milliman Inc.

Julianna Pattera, CAIA

Research Analyst
Marquette Associates

David Sancewich

Managing Director
Pension Consulting Alliance

Frank Valle, CFA, CAIA

Consultant, Fixed Income Research
Aon Hewitt

1:20 -2:20 pm

White & Gold Ballroom

A GLOBAL PERSPECTIVE ON INSTITUTIONAL INVESTOR BEHAVIOR

At this lunch, eVestment will explore:

- What universes are receiving the most activity and asset flows from consultants and investors
- The globalization of the manager search - regional behavior and where to find opportunities
- How asset managers are differentiating themselves in a more competitive environment
- Additional trends and data to help you understand where the headwinds and tailwinds are for your strategies

SPEAKER**John Molesphini**

Global Head of Strategic Engagement
eVestment

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

MANDATEWIRE

Global mandate coverage.

Robust directories.

Comprehensive CRM integration.



DATA IS POWER

Please visit our booth or visit mandatewire.com/demo for a complimentary demo and trial

SPEAKER, MODERATOR & CONFERENCE COMMITTEE BIOGRAPHIES

CONFERENCE CHAIRS



Gus Catsavis, CFA

Co-Chair

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.



Holly Verdeyen

Co-Chair

Director, Defined Contribution Investments

Russell Investments

Holly Verdeyen is responsible for working with Russell's institutional consulting, sales, and client service groups to promote Russell's DC investment services. More specifically, her focus is on default investments - target date collective trusts, custom target date portfolios and Russell Adaptive Retirement Accounts. Holly also shares Russell's perspective on trends in the defined contribution market while offering advice on best practices in institutional plan design. Holly joined Russell in 2013 from UBS Global Asset Management, where she was a DC specialist in the Defined Contribution and Retirement Solutions group, focusing on investment solution support and client relationship management, as well as broad retirement solutions and guaranteed lifetime income. Holly joined UBS Global Asset Management in 2003 from Blackrock (formerly Barclays Global Investors), where she was in a business development role within the Defined Contribution Group.

Holly is a member of the Economic Club of Chicago, and serves on the Boards of Directors for the YWCA of Metropolitan Chicago and the Association of Investment Management Sales Executives (AIMSE).

MODERATORS, SPEAKERS & CONFERENCE COMMITTEE

*Indicates Annual Conference Committee Member

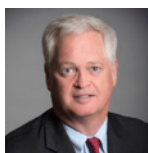


Ryan Anderson

Managing Director

Pavilion Advisory Group Ltd.

Mr. Anderson is responsible for developing, implementing and monitoring Pavilion's business plan for the Canadian institutional investment consulting market. He participates in the development of new products and services responsive to client needs. He also works directly with some clients, leveraging his in-depth knowledge of managers and their strategies in a variety of consulting engagements. From 2008 until 2017, he held the role of Director, Manager Research leading Pavilion's traditional manager research function and dedicated team spanning both Canada and the United States. Mr. Anderson has been with the firm since 1996 when he joined as a research analyst, helping clients with manager structure and search projects. In 2004, Mr. Anderson relocated to Boston from where he grew the firm's presence as an investment consultant in the U.S. plan sponsor community. He moved back to Montreal in 2008 as head of research. Mr. Anderson holds a Bachelor of Business Administration degree (Finance) from Bishop's University.



T. Neil Bathon

Managing Partner

FUSE Research Network

In 2008, Neil formed FUSE Research Network LLC in order to improve the effectiveness of the sales, marketing and product functions associated with the distribution of investment products. FUSE delivers customized market intelligence which improves decision making and tactical execution. As of the end of 2016, FUSE provides ongoing support to 45 investment management firms which range in size from less than \$500 million in AUM to more than \$1 trillion.

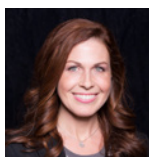
Prior to FUSE, Neil founded Financial Research Corporation (FRC) in 1987 and over the next 20 years built a business that delivered innovative competitive intelligence to more than 200 fund groups who collectively accounted for over 95% of U.S. mutual fund assets under management. Neil maintains an extensive network across all facets of the asset management industry and has a unique vantage point from which he has observed 30+ years of evolution of investment firms – leading to a keen sense of how and why companies succeed or fail.

Neil serves as an independent director for the Vertical Capital Income Fund and has been an independent director for BNY Mellon Charitable Gift Fund and Financial Investors Variable Investment Trust. Neil has appeared on CNBC and Bloomberg and is a regular contributor to a wide range of business publications including Wall Street Journal, Reuters, Ignites, Barron's and InvestmentNews. Neil is also active with industry trade groups (ICI, MMI, MFEA, PAICR) and is a regular speaker and judge (NOVA Awards, WealthManagement.com Awards) at industry events. Neil began his professional career in 1983 as an analyst with Zacks and later moved to Kemper Financial to lead the competitive research effort. Neil received his undergraduate degree from Marquette University and an MBA from DePaul University.

**Greg Bauer, CFA, CAIA***

Director, Institutional Relationships
Parametric Portfolio Associates

Mr. Bauer is responsible for developing, coordinating, and executing the sales and marketing strategies for Parametric's unique family of products in the Southeast region of the United States. Prior to joining Parametric in 2015, Greg worked at Crawford Investment Counsel where he was the Director of Institutional Services, responsible for leading the institutional sales and consultant relations efforts. Prior to Crawford, Greg worked for both Callan Associates and NEPC. Greg earned a B.A. from Brown University and an MBA from the Georgia Institute of Technology. Greg is a CFA charterholder and a member of the CFA Society of Atlanta. He also holds a CAIA designation.

**Heather Beatty***

Vice President
First Eagle Investment Management

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

**C. Wes Burton, Jr.**

Vice President – Treasury, Tax and Information Services
Vulcan Materials Company

Wes Burton is the VP - Treasury, Tax and Information Services for Vulcan Materials Company (the nation's largest producer of construction aggregates, and a major producer of hot mix asphalt and ready-mix concrete), is a member of the Investment Committee for Vulcan's pension plans and 401(k) plans, and is intimately involved in many management issues pertaining to the retirement plans (e.g., pension funding strategy).

Wes has 11+ years of 'buy side' experience having served as Treasurer of Vulcan Materials for 7 years, and Treasurer of Saks Incorporated for 4+ years. He also has 16+ years of 'sell side' experience, 14+ years in corporate & investment banking, and 2 years in enterprise performance management consulting with Accenture. Wes is a graduate of Georgia Tech.



Elizabeth Burton, CAIA

Managing Director Quantitative Strategies Group
Maryland State Retirement and Pension System

Elizabeth Burton is the Managing Director of the Quantitative Strategies Group at the Maryland State Retirement Agency. In this role, Ms. Burton is responsible for the \$4B Absolute Return Portfolio and for risk management oversight of the \$50B Plan. Ms. Burton joined the Agency in July 2016.

Most recently, Ms. Burton owned William Street Advisory—a strategic advisory practice which she founded in 2013. Prior to that role, Ms. Burton was a Senior Economist and Expert Witness with Criterion Economics. Prior to that role, Ms. Burton was a Consultant at First Annapolis where she worked on M&A transactions and consulting the payments industry. Previous positions include: Co-Portfolio and Quantitative Risk Analyst with a South Africa-based fund of hedge funds, Trader (fixed income securities) for a risk management firm, and Portfolio Management Associate with a quant-focused fund of hedge funds.

Ms. Burton received her Bachelor's degree in Political Science and French, cum laude, from Washington and Lee University, and her MBA in Finance, Econometrics & Statistics from the University of Chicago Booth School of Business. She is on the board of a private residential real estate investment trust and a Trustee of The Hill School, a private boarding school. She is also a CAIA charter holder. Ms. Burton was named one of Chief Investment Officer Magazine's Top-40-Under-40 in June 2017.



Tony Buscemi*

Partner
Gallatin Capital LLC

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



James A. Callahan, CFA

President
Callan LLC

James A. Callahan, CFA, President, oversees our consulting services groups, including Fund Sponsor Consulting, Defined Contribution Consulting, Real Assets Consulting, Trust, Custody and Securities Lending, and the Independent Advisor Group. In addition to being a member of Callan's Management Committee, Jim serves as the chair of Callan's Client Policy Review Committee, which provides oversight and direction on the firm's strategic planning work for clients. He is a shareholder of the firm.

Prior to his role as president, Jim served as the head of Fund Sponsor Consulting, overseeing the

firm's five consulting offices. Jim's prior roles at Callan include management of the San Francisco, Atlanta, and Chicago offices. He joined Callan in 1993 as an analyst in the firm's Client Report Services group and was previously an analyst and trader within the money market securities team at Bankers Trust Company in New York.

Jim earned a B.A. in Economics from Boston College and is a holder of the right to use the Chartered Financial Analyst designation.



Erik Carleton, CFA, CAIA

Director of Pension Investments
Textron Inc.

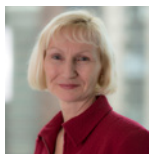
Erik is a Director of Pension Investments at Textron Inc., responsible for Public Markets manager selection in fixed income, equities, and currencies. He joined Textron after beginning his investment career in consulting; first in manager research covering non-U.S. equities at Fiduciary Investment Advisors, then as a consultant focused on corporate and high net worth clients at NEPC. He holds the Chartered Financial Analyst (CFA) designation, has completed the Chartered Market Technician (CMT) exams, and serves as a member of the investment committee for the Bentley University endowment.



Carolyn Carollo, CIPM

Managing Director
Cardinal Investment Advisors

Carolyn's primary responsibility for Cardinal is client service and secondary responsibility is manager research. Her manager search responsibilities encompass international and emerging market equity managers, along with bank custodians and investment accounting software firms. Carolyn joined the Cardinal team in 2001 from Summit Strategies where she worked in all aspects of the consulting process: performance, research, and client service. Prior to Summit Strategies, Carolyn worked for The May Department Stores Company in financial reporting. Carolyn holds a B.S.B.A. from the University of Missouri, an MBA from Maryville University, and passed Level I of the Chartered Financial Analyst (CFA) program. She is a CIPM certificate holder.



Deborah 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. She also specializes in Women & Diverse managers and Gender Lens investing.

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



Tishawna Clyburn

Senior Investment Analyst
Prudential Financial, Inc.

Tishawna Clyburn is an Investment Associate within Prudential's Alternative Assets Group. Tishawna supports the groups hedge fund research and due diligence efforts. Prior to joining Prudential in 2013, Tishawna was an investment banking analyst at Key Bank. She was recently recognized in CIO Magazine's 40-under-Forty June 2017 issue. She holds a BA in Business Administration with a concentration in Finance from the New Jersey Institute of Technology.



Toni Cornelius

Senior Program Consultant
Robert Toigo Foundation

Toni E. Cornelius serves as a senior program consultant for the Robert Toigo Foundation in the areas of leadership development, and human capital strategies.

She is a member of the non-profit's thought leadership team participating as a writer in both surveys and white papers released in 2017. Additionally, she has designed leadership development training delivered to the 180 current Toigo fellows across 18 schools. She also manages the Foundation's board readiness program, All a Board.

She has also operated as an independent consultant, providing guidance in the areas of change management program development, executive career coaching.

Ms. Cornelius is the founder of TamarindTree Consulting. Using a variety of methods, including workshops and panel facilitation, leadership development and training, TamarindTree guides clients toward sustainable diversity and inclusion strategies for their organizations.

She is a certified instructor of the Hogan Level I Leadership Assessment Program; an accredited instructor in the Hay Group Emotional and Social Competency Inventory (ESCI); a Myers Briggs Type Indicator qualified instructor; and a certified coach for the Center for Creative Leadership, Executive Dimensions program.

Toni serves as a member of the Boards of Directors of the Associated Colleges of Illinois and the Chicago Sinfonietta and is a past member of the board of the Chicago chapter of the Society of Human Resources Management. She is a mentor in the Chicago Urban League IMPACT program and a recipient of the Chicago Defender 2016 Women of Excellence Award.



Mark Doherty, CFA

Managing Principal, Head of Hedge Funds
PivotalPath

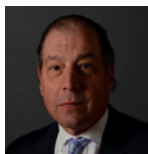
Mr. Doherty is a Managing Principal and Director of Research at PivotalPath, which includes overseeing the due diligence process, setting research initiatives and managing client interactions.

Mr. Doherty has 20 years of experience in the hedge fund industry, during which time he has been responsible for manager selection, asset allocation and ongoing monitoring of multi-billion dollar hedge fund portfolios.

From 2007-2012, Mr. Doherty served within the management team for Citadel, LLC's equity platform

business. During his tenure, in addition to sourcing managers, he acted as an advisor to the existing portfolio managers. Prior to Citadel, Mr. Doherty worked as hedge fund allocator at Deutsche Bank from 2004-2007, UBS Financial Services from 2002-2004 and JP Morgan from 1999-2002.

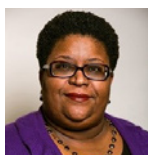
Mr. Doherty earned an MBA from the Stern School at New York University and holds a BA in Applied Mathematics and Economics from Drew University. He has been a CFA charter holder since 2000.



Steve Dunn

Executive Vice President, Global Distribution
Cohen & Steers Capital Management Inc.

Stephen Dunn, Executive Vice President, Global Distribution oversees sales of Cohen & Steers' investment products and strategies to institutional investors, consultants and sub-advisory platforms worldwide. He has 32 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 holds FINRA Series 7, 24, 63 and 3 licenses. He is based in New York.



Raudline Etienne

Founder & Managing Partner
Daraja Capital

Raudline Etienne is the Founder and Managing Partner of Daraja Capital, an advisory firm providing strategic advice to start up and early stage boutique asset managers.

Ms. Etienne is a Senior Advisor of the global strategy firm Albright Stonebridge Group (ASG). Ms. Etienne is a trustee of the Janus Henderson Funds where she represents the interests of fund investors. She also is a member of the Board of Directors of Brightwood Capital Advisors, a capital provider to U.S. middle market companies.

From 2008 through 2011, Ms. Etienne served as Chief Investment Officer (CIO) for the New York State Common Retirement Fund (CRF), the third largest public pension fund in the United States with assets of \$145 billion. As CIO, she oversaw all aspects of CRF's investment strategy, including asset allocation, policy and governance, investment structure, partner selection, and risk management. Her responsibilities included oversight of 60 professionals and management of a global portfolio of equity, fixed income, hedge funds, real estate, private equity and opportunistic investments. She also was responsible for CRF investment operations, including internal portfolio management, custodial services, and securities lending, as well as management of external investment advisors and consultants. Previously, Ms. Etienne was a Managing Director, and Co-Head of Non-Traditional Investment Group at Rogerscasey in Darien, Connecticut.

Ms. Etienne was instrumental in creating the Connecticut Hedge Fund Association where she was a board member, and also served on the Toigo Foundation Governing Board. She was appointed to the International Accounting Standards Board and the U.S. Financial Accounting Standards Board's Financial Crisis Advisory Group, which considered financial reporting improvements to enhance investor confidence.

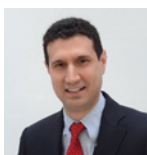
Ms. Etienne earned a Bachelor of Science degree from the Massachusetts Institute of Technology and an MBA in finance from the University of California at Berkeley.



Kristin Fenik, CFA*

Managing Director
ArrowMark Partners

Kristin is a Client Portfolio Manager for ArrowMark Partners. She joined the firm in 2014 to assist with investment consultant outreach and to partner with institutional clients. Kristin has enjoyed 15 years in asset management previously working as a Vice President of Global Consultant Relations at OFI Global and OppenheimerFunds, Inc. as well as a marketing associate for Putnam Investment's Global Institutional group. Kristin graduated with a bachelor's degree from Fordham University and a MBA from Duke University's Fuqua School of Business earning the Fuqua Scholar distinction. Kristin holds the Chartered Financial Analyst designation and is a member of both the CFA Society of Colorado and the CFA Institute.



Paul Ferro

Investment Consultant
Curcio Webb

Paul is a Consultant in Curcio Webb's investment practice located near Princeton, NJ. He advises clients on asset allocation, investment plan design, investment manager selection, fee benchmarking, participant communications, and governance issues. Prior to Curcio Webb, Paul spent 10 years with an institutional investment consulting firm where he was a Consultant as well as a team leader and member of the Investment Strategy Group responsible for client decisions. Paul has worked with a diverse set of clients including hospitals, endowments and foundations, and non-profit organizations. In his current role, Paul works primarily with corporate defined contribution and defined benefit plans. Prior to his consulting experience, Paul was a trust officer at a national bank and a history teacher.



Ami Fox*

Marketing/Client Service
DePrince, Race & Zollo, Inc.

Ms. Fox joined DePrince, Race & Zollo, Inc. in 2007. Ms. Fox's responsibilities include marketing and client service across the institutional marketplace. Ms. Fox was an intern at DePrince, Race & Zollo, Inc. prior to joining the firm full time. Ms. Fox received her Bachelor of Arts in International Business from Rollins College in Winter Park, Florida.



Bridget Gaffney*

Institutional Sales
First Eagle Investment Management

Bridget is a Sales Associate on the Institutional team at First Eagle Investment Management and is responsible for helping develop and manage strategic relationships with institutions and consultants primarily in the Midwest and on the West Coast. Prior to joining the firm in May 2017, Bridget was an investor relations associate at EnTrustPermal supporting the institutional, retail, and international sales teams in maintaining and cultivating client relationships. Prior to this, she worked as a corporate analyst for the ad agency Mindshare. Bridget received her bachelor of science in finance with a minor in mathematics from the University of Connecticut.



Michael Gillis

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 Seamark Asset Management. Previously, he worked for the Halifax Grammar School for 2 years, as a Teacher. Michael has also worked as a Director of Business Development for National Trust, and has held the position of Senior Account Representative for both Royal Trust and National Trust.

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

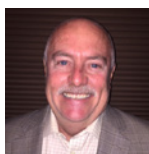
Michael is also an active board member for the Association of Investment Management Sales Executives (AIMSE) and Benefits and Pensions Monitor. Michael is also actively involved in the Canadian Benefits and Pension Institute (CPBI), the Association of Canadian Pension Managers (ACPM), the Canadian Association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



Ramon Gonzalez, CFA

Vice President
Wilshire Associates

Ramon Gonzalez is a vice president of Wilshire Associates and a member of Wilshire Funds Management's manager research group. Mr. Gonzalez joined Wilshire in 2011 and is primarily responsible for the coverage of non-U.S. and global equity research. He is a voting member of Wilshire Funds Management's Investment Committee. Mr. Gonzalez has 17 years of experience as a financial analyst, economist and investment consultant, having worked with a broad array of clients including institutional plan sponsors, ultra-high net worth investors and government agencies. His experience spans firms such as Acacia Wealth Advisors, Angeles Investment Advisors, the Milken Institute and Goldman Sachs. Mr. Gonzalez earned his BA from the University of California, Los Angeles, majoring in international economics and French, and studied at the Université de Toulouse in Toulouse, France. He also holds the Chartered Financial Analyst designation and is a member of the CFA Society of Los Angeles.



James Goodwin

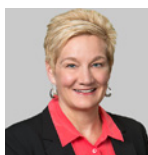
Director, Retirement Plans
US Foods

Jim is currently Director of Retirement and Equity Plans at US Foods and a 30-year veteran in the retirement industry. US Foods is one of America's great food companies and a leading foodservice distributor, partnering with approximately 250,000 restaurants and foodservice operators. With over 25,000 employees and more than 60 locations, US Foods provides our customers with a broad and innovative food offering and a comprehensive suite of e-commerce, technology and business solutions.

Jim has been with US Foods for over 11 years working within the HR Department and the Total Rewards Team. He manages a team of professionals that service the retirement and equity needs of a large and diverse demographic that spans from the executive leadership team to a large blue-collar base of employees. Jim's team partners with various outside organizations to provide retirement (DC and DB), equity and stock ownership services.

Prior to joining US Foods Jim worked with Merrill Lynch in their Retirement Group providing retirement plan consulting to the large marker client base of Merrill Lynch. Jim also has worked with Northern Trust Bank, The Wyatt Company (now part of Willis Towers Watson) and the Administrative Management Group (now part of Lincoln Financial Management Group).

Jim graduated (a very long time ago) from Illinois State University with degrees in Accounting and Business Administration.



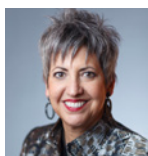
Sally Haskins

Senior Vice President, Real Assets Consulting
Callan LLC

Sally Haskins is a Senior Vice President and Co-Manager of Callan's Real Assets Consulting group. She has overall responsibility for real assets consulting services and oversees research and implementation of real estate, timber, infrastructure, and agricultural asset classes. She oversees all investment due diligence for real assets and is a member of Callan's Alternatives Review Committee. She is responsible for strategic planning, implementation, and performance oversight of plan sponsor clients' real assets portfolios. Sally is a member of Callan's Management Committee and is a shareholder of the firm.

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

Sally received an MS in Real Estate Appraisal and Investment from the University of Wisconsin-Madison and a BA (Magna cum Laude and Phi Beta Kappa) from St. Olaf College.



Joanne Hickman Dodd

Senior Vice President, Relationship Manager
Capital Group

Joanne Hickman Dodd is a relationship manager at Capital Group. She has 34 years of investment industry experience and has been with Capital Group for four years. Prior to joining Capital Group, she was a managing director and global head of consultant relations at Northern Trust Asset Management, and a managing director and head of consultant relations, Americas, at UBS Global Asset Management. She holds an MBA from Loyola University Chicago Quinlan School of Business and a bachelor's degree in finance and economics from Elmhurst College. She is a co-founder of Women Investment Professionals in Chicago. Joanne is based in Chicago.



Dick Hoag

Partner

Corinthian Cove Consulting, LLC

Richard Hoag is a Partner with Corinthian Cove Consulting, a global strategic and tactical consulting firm to the investment management industry. Prior to Corinthian Cove, he was at Sawgrass Asset Management where he was responsible for initiating and maintaining senior relationships with corporations, endowments and foundations & their associated investment consultants. Before Sawgrass, Richard spent seven years with Landmark Global Advisors and predecessor firm Liontrust International as Managing Partner and President responsible for North American Institutional business. Previously, he was a Managing Director and Co-Head of Institutional Sales at Merrill Lynch Investment Managers and responsible for Corporate Endowment/Foundation business development and client service. Before that, he was an Executive Vice President and managing Director for Gartmore Global Partners where he ran the U.S. institutional business, and was a member of the firm's executive committee. His educational accomplishments include a B.A. in Economics and a Teaching Degree from Lawrence University. He is a past president and served on the Board of Directors of the Association of Investment Management Sales Executives (AIMSE) and is a recipient of their prestigious Richard A. Lothrop Outstanding Achievement Award.



P. Mackenzie Hurd, CFA*

Managing Director, Consultant Relations

Jennison Associates, LLC

MacKenzie Hurd joined Jennison Associates in November 2013 and is responsible for developing and managing consulting relationships. Previously, MacKenzie held relationship management positions at Rainier Investment Management and The Capital Group Companies.

He began his investment career at Callan Associates where he was a partner and senior investment consultant.

MacKenzie holds the Chartered Financial Analyst designation and is a past President of the Association of Investment Management Sales Executives (AIMSE). He graduated from Dartmouth College with a Bachelor of Arts degree in English where he was captain of the men's golf team.



David Hyman, CFA

Partner & U.S. Wealth Manager Solutions Segment Leader

Mercer

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

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

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



Russ Ivinjack

Senior Partner

Aon Hewitt

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

Ivinjack's recent activities include:

- Assisted the United States' largest retirement system, a \$525 billion public fund defined contribution plan, completed a comprehensive investment program review, which included evaluating the appropriateness of adding new asset classes/fund types and assisting with a strategic investment operations review.
- Completed a Benchmarking and Best Practices Review of Mexico's \$180 billion and 55 million participant National Retirement System.
- Assisted multiple billion dollar plus clients conduct searches for U.S. equity, international equity, fixed income, and alternative investment managers, including infrastructure, real estate, and private equity.
- Worked with Central Bank of Chile to review best-practices in securities lending, foreign exchange transactions and custodian services.
- Frequent speaker on the topic of alternative investments, defined contribution plans and the evolution of the investment consulting industry at industry conferences.

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

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



Chris Krein

Managing Director

Artisan Partners, Limited Partnership

Christopher J. Krein is a managing director of Artisan Partners and a business leader for the firm's Developing World team. Prior to joining Artisan Partners in September 2015, Mr. Krein was head of institutional distribution at WisdomTree Asset Management where he was responsible for marketplace research, product placement and formulating a distribution strategy. Before that, he was a managing director at ACCI, LLC. Mr. Krein holds a bachelor's degree in finance (magna cum laude) from DeSales University. Mr. Krein is a Past-President of AIMSE.



Steve Kneeley

President & Chief Executive Officer
Driehaus Capital Management

Stephen Kneeley is president and CEO of Driehaus Capital Management. Previously, Mr. Kneeley served as CEO of Context Asset Management, which offers liquid alternative investment solutions, and of Spider Management, which provides investment management services to endowments and foundations. Prior to joining Spider, he was CEO of Ardmore Investment Partners, a consultant to asset management firms on strategic initiatives. Mr. Kneeley was also a senior partner at Logan Circle Partners and the managing director of Brandywine Global Investment Management, a Legg Mason affiliate. He is a founder of Turner Investment Partners and served as its president and CEO. While at Turner, Mr. Kneeley was responsible for all non-investment activities of the firm. He began his career with The Travelers Companies.

Mr. Kneeley received a B.S. degree in economics and political science from the University of Richmond. He served on the University of Richmond's Board of Trustees from 2002 through 2010 and as Emeritus Trustee from June 2010 through 2012, and 2014 through the present. He also served on the Board of Spider Management and is currently on the Investment Committee of Thomas Jefferson University.



Robert Kowalski

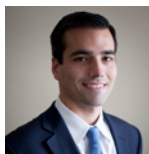
Director of Investments
Beaumont Health

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.



Aaron Lally, CFA, CAIA, CIPM

Executive Vice President
Meketa Investment Group, Inc.

Mr. Lally joined Meketa Investment Group in 2013 and has been in the investment industry since 2008. A Consultant based in the firm's Florida office, Mr. Lally works with non-profits, public pension funds, and multi-employer clients primarily located across the southeastern United States. His work includes investment policy development, asset allocation studies, performance measurement and manager selection/due-diligence. In addition, he conducts investment research and contributes to the firm's marketing and business development efforts.

Prior to joining the firm, Mr. Lally spent three years at JP Morgan Chase and two years at Westfield Capital Management. Mr. Lally earned an undergraduate degree in Economics from Boston College. Mr. Lally holds the Chartered Financial Analyst (CFA) designation, the Chartered Alternative Investment Analyst (CAIA) designation, and the Certificate in Performance Measurement designation (CIPM).

Mr. Lally is a frequent speaker at the Florida Public Pension Trustees Association (FPPTA) and is a member of the Texas Association of Public Employee Retirement Systems (TEXPERS).



Panayiotis Lambropoulos, CFA, CAIA, FRM

Portfolio Manager, Hedge Funds

Employees Retirement System of Texas

Panayiotis Lambropoulos is a Portfolio Manager of Hedge Funds at the Employees Retirement System of Texas – a \$26 billion retirement plan – located in Austin, Texas. His responsibilities include sourcing, analyzing and evaluating potential hedge fund managers, process and performance assessment, interviewing various fund employees and third-party service providers, and maintaining due diligence efforts.

Panayiotis started in the alternative investment industry as a Research Analyst in Grosvenor Capital Management in Chicago. He later joined MCP Alternative Asset Management, a \$6 billion Tokyo-headquartered Investment Advisor (Fund of Funds) in Chicago. He was responsible for sourcing, analyzing and monitoring hedge fund investments, and contributing to portfolio allocation decisions. He worked alongside institutional clients, all of which were top investment decision makers for some of Japan's best and largest blue chip financial institutions.

Panayiotis holds a B.S in Business Administration with a concentration in Finance and Marketing from Boston College, and an M.B.A in General Management from Northwestern University's Kellogg School of Management. Panayiotis is a CFA Charterholder and has earned his Chartered Alternative Investment Analyst (CAIA) designation as well as his Financial Risk Manager (FRM) certification.



Ken Lee

Director of Investments

Carnegie Corporation of New York

As the Corporation's director of investments, Mr. Lee co-leads its portfolio strategy for marketable investments, which include long-only, absolute return, and fixed income asset classes. As part of this role, Mr. Lee serves as the primary lead on the Corporation's developed markets mandates. Mr. Lee also manages the Corporation's venture capital and growth equity activities in private markets.

Prior to joining the Corporation, Mr. Lee served as a senior investment analyst in New York and London at Fauchier Partners, a hedge fund-of-funds that managed money on behalf of pensions, insurance companies, foundations, and endowments outside the United States. Previously, Mr. Lee worked as an investment associate at Horsley Bridge Partners, a private equity fund-of-funds manager, in San Francisco and London. Mr. Lee began his career as an investment banking analyst in the San Francisco office of Robertson Stephens, a boutique investment bank focused on growth companies.

Mr. Lee holds an MBA from the Wharton School at the University of Pennsylvania, and a BA from Yale College, where he studied Economics, and East Asian Studies, with a focus on the History of Art.



Leslie Lenzo, CFA

Chief Investment Officer & Vice President, Treasury
Advocate Health Care

Leslie K. Lenzo, CFA is Vice President, Treasury & Chief Investment Officer at Advocate Health Care in Downers Grove, IL. In her role at Advocate, Ms. Lenzo oversees the investment of \$7 billion in corporate and pension assets. She also oversees the investment options available in Advocate's \$3 billion defined contribution plans. Prior to Advocate Ms. Lenzo spent seven years in the investment office at Northwestern Memorial Healthcare in Chicago. Ms. Lenzo started her career with the investment program at Partners Health Care in Boston and she then took a brief detour to the sell side, spending two years in equity research covering Healthcare Services at SG Cowen. Ms. Lenzo holds a BA in Economics and Government from Georgetown University and a MBA in Finance from Boston University. She is also a CFA charter holder. Ms. Lenzo resides in Illinois with her husband, four young sons, and their Boston Terrier.



Chris Levell, ASA, CFA, CAIA

Partner, Client Strategy
NEPC

Chris' consulting career began in 1987, and he joined NEPC in 2005. He currently leads the Client Strategy Group within Research, working with other Partners and the Asset Allocation team on strategic topics applicable to many clients, as well as one-time special projects. Chris has initiated several roles at NEPC, having been our first senior actuarial hire, later forming the Asset Allocation team in Research, and most recently leading the Corporate Practice Group. He advises many clients on strategic asset allocation and led the development of risk budgeting, scenario forecasting and liquidity analysis at NEPC. Chris is also a senior adviser for the Liability-Driven Investment Advisory Group.

With his background as an actuary, Chris has significant experience in helping clients make strategic decisions on the coordination of asset allocation with plan design, contributions, and financial statements. He has assisted clients on over 250 asset-liability studies.

Prior to joining NEPC, Chris was a Principal with Mercer Investment Consulting, serving as a lead consultant as well as an asset-liability project consultant. In 1997, he was charged with developing Mercer's US asset-liability modeling capability. Prior to joining Mercer in 1987, Chris was an actuarial analyst at Allstate Life Insurance Company.

Chris is a frequent speaker at conferences on pension strategy and co-authored a chapter in Positioning Pensions for the Twenty-First Century.

Chris holds a bachelor's degree in actuarial science from the University of Illinois at Urbana-Champaign. He is an Associate of the Society of Actuaries and a Fellow of the Conference of Actuaries. In addition, he holds the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations, and is a member of the Boston Security Analysts Society.

**Brad Long, CFA**

Principal, Research Director Global Public Markets
DiMeo Schneider & Associates

Brad joined DiMeo Schneider & Associates, L.L.C. in 2012 and directs the firm's Core Investment Strategy Group, overseeing investment research across global equity, global fixed income and global real assets. He is a member of the firm's Investment Committee, Discretionary Committee and all Research Teams. Additionally, Brad leads the firm's efforts in mission-aligned investing across both public and private markets as well as chairs the firm's Target Date Committee. Prior to joining the firm, Brad worked in various research capacities at Citigroup and Wells Fargo in New York. He received a BA in Finance and Minor in Economics from The University of Colorado and is a CFA® charterholder and member of the CFA Society of Chicago and CFA Institute. Additionally, he is active with Greenhouse Scholars, a nonprofit providing financial and personal support to under-resourced college students. In his free time, Brad loves cooking and spending time with his wife and young sons.

**Matthew Maleri**

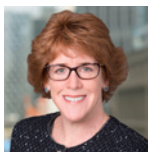
Partner
Rocaton Investment Advisors

Matt Maleri, Asset Allocation, is a Partner of Rocaton and member of Rocaton's capital markets/asset allocation group. In addition, Matt assists with investment manager research. In this role, Matt provides insight and perspective on the markets and is responsible for general asset class research. Additionally, Matt and the capital markets/asset allocation group are responsible developing the firm's forward looking capital market assumptions. Matt joined Rocaton in 2008 and has served in a variety of roles within Rocaton's Consulting Group. Matt holds a B.S. in Business Administration from Sacred Heart University. Matt has also earned an M.B.A. from Sacred Heart University.

**Maritza Martinez, CAIA**

Associate Consultant
RVK, Inc.

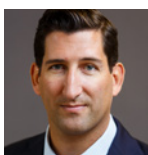
Maritza Martinez, Associate Consultant, joined RVK in 2013 and based in the firm's Chicago office. Maritza is a member of RVK's OCIO search and monitoring team, which is responsible for conducting search, evaluation, and monitoring assignments for clients who wish to engage with a discretionary provider. The team also reviews clients' implementation and governance structures and provides education presentations on the different investment management models. Maritza also works with RVK's consulting teams and a variety of client types on various projects such as asset allocation studies, asset class structure optimizations, investment manager searches, and client education presentations. Prior to joining RVK, Maritza was a hedge fund researcher focused on commodity and inflation hedging manager research at AonHewitt. Maritza received a B.S. in Economics and Statistics from the University of Chicago and holds the CAIA designation.

**Lori McEvoy***

Managing Director, Global Head of Distribution
Jennison Associates LLC

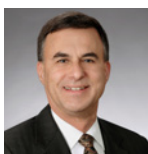
Lorraine “Lori” E. McEvoy is a managing director and the global head of distribution. She joined Jennison Associates in December 2017. Prior to joining Jennison, Lori was the head of institutional sales at ClearBridge Investments where she was responsible for the direction and management of institutional sales, consultant relations, and subadvisory relationships. She was also a member of the leadership team that managed the distribution and sales organization. Before joining ClearBridge, she was the head of institutional sales and service and director of consultant relations at Fred Alger Management. Prior to Fred Alger, she was the director of consultant relations at WisdomTree Investments.

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

**John Molesphini**

Global Head of Strategic Engagement
eVestment

John is currently eVestment’s Global Head of Strategic Engagement, where he focuses on enhancing the relationship with leadership at client firms and also discussing industry trends and eVestment’s data and analysis with broader client and industry audiences. Previously, he was Global Head of Client Success, managing efforts to ensure eVestment’s clients realize their full value and satisfaction with their subscriptions while having an amazing client experience. Prior to that, he has served as the Director of eVestment’s Global Sales Specialist team, an Omni Specialist on the eVestment Business Development team, and Vice President and Manager of Client Service. Prior to joining eVestment in July 2006, John worked for a hedge fund for a short time and before that, he spent four years at INVESCO, most notably as a Marketing Support Manager which included the consultant database reporting team.

**Jeffrey Nipp, CFA, CAIA**

Senior Investment Consultant
Milliman Inc.

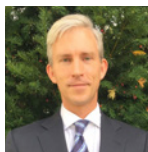
Jeff Nipp is a senior investment consultant in the San Francisco office of Milliman, which he joined in 2017.

Jeff is a seasoned investment professional with nearly 30 years of experience evaluating, communicating, constructing, and monitoring multi-asset class portfolios.

Prior to joining Milliman, he most recently served as the head of solutions for Invesco, responsible for developing customized outcome-oriented portfolios for retail and institutional clients, while also providing objective analysis of Invesco’s product offerings. Previously, he spent more than five years with BlackRock as a managing director in the Multi-Asset Client Solutions team, where he designed and implemented manager research/selection and asset allocation input processes and chaired the Manager Research Review Committee.

Prior to that, Jeff spent over 20 years as an institutional investment consultant with Watson Wyatt and Towers Perrin, heading investment manager research at each firm.

He is a Chartered Financial Analyst charterholder and holds the Chartered Alternative Investment Analyst designation. He is a member of the CFA Society of San Francisco.



Deken Palmer

Director

CEB, Now Gartner

Deken Palmer directs the Sales and Marketing Solutions group. He is an expert in applying the CEB Challenger™ commercial model within today's financial services marketplace and works with many of the world's largest investment managers and commercial banks, focusing on profitable growth through competitive differentiation.

In advising industry leaders, Deken draws on 20-years of experience in both consulting and revenue roles. Following a decade managing client assets for UBS, he's published public sector research rooted in Modern Portfolio Theory; managed technology implementations focused on sales enablement, and consulted to non-profit organizations on matters of financial viability.

A true market junky, Deken is avid golfer and runner.... and calls Seattle, Washington home.



Rob Palmeri, CFA

Director of East Coast Consulting, Head of Defined Contribution Solutions Group

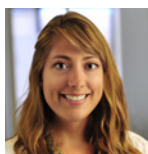
RVK, Inc.

Robert "Rob" Palmeri is a Senior Consultant, located in our New York office, and serves as RVK's Director of East Coast Consulting and Head of the Defined Contribution Solutions Group ("DCSG"). He joined RVK in 2005 and has over 30 years of experience working in the investment consulting and asset management industry.

As a Consultant, Rob has extensive experience assisting corporations, government entities, and endowments & foundations in every aspect of developing, managing, and monitoring their investment programs. In addition to his consulting responsibilities, Rob coordinates and implements RVK's East Coast consulting and DCSG activities.

Prior to joining RVK, Rob was a Senior Investment Consultant with KPMG, LLP where he provided consulting services to institutional defined contribution clients on all aspects of the institutional investment management process. While at KPMG, he was responsible for the largest number of defined contribution client relationships including one of KPMG's largest consultant clients, a global corporation. It was with this client that Rob first introduced alternative investments to risk-based, lifecycle funds. In addition to his institutional client retainer relationships, he led numerous projects assisting defined contribution clients in navigating issues resulting from the mutual fund scandals in the earlier part of the 2000's. Projects included structure and fee reviews, vendor searches, manager searches, risk-based modeling, and other DC-related projects.

Rob earned his Bachelor of Science degree in Finance from Ithaca College in Ithaca, NY and holds the Chartered Financial Analyst designation. He is a member of the CFA Institute and a member of the New York Society of Financial Analysts. Rob is a shareholder of the firm.



Julianna Paterra, CAIA

Research Analyst

Marquette Associates

Julianna Paterra is a research analyst for Marquette Associates and has four years of investment experience. She joined the firm in 2014 and is responsible for conducting due diligence on secondary private equity products and managers and target date funds, as well as developing macroeconomic and capital markets research. Additionally, she is a member of the traditional and alternative manager search committees, impact committee, wealth advisory committee, and the employee engagement committee.

She holds a B.S. in molecular genetics with a minor in business from The Ohio State University and serves as President of The Ohio State Alumni Club of Chicago. Julianna is a CAIA charterholder, a member of the CAIA Association, and has passed Level III of the CFA Program.



Carolyn Patton, CFA*

Head of Distribution Americas

First State Investments

Carolyn Patton, CFA has 26 years of experience in the investment management industry and is the Head of Distribution, Americas at First State Investments. First State Investments is a diverse global asset management business headquartered in Australia, with assets under management of \$170B as of December 31, 2017. The firm's expertise spans a range of asset classes comprising direct and listed infrastructure, fixed income, Asia Pacific and emerging markets equities. FSI places a high degree of focus on responsible investment and adopted the United Nations Principles of Responsible Investment (UNPRI) in 2007.

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

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



Matt Pawlak*

Vice President, Consultant Relations

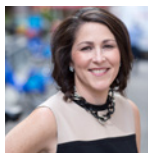
Dimensional Fund Advisors

Matt Pawlak has 15 years of experience in the investment industry. Matt is responsible for developing and executing strategic marketing and business plans for Dimensional Fund Advisors (Dimensional). He works with institutional investment consultants through proactive engagement and promotes Dimensional's investment philosophy, processes, and investment strategies. Prior to joining Dimensional in January 2012, Matt worked for eight years at Hewitt EnnisKnupp. As a senior consultant, he acted as lead and co-lead consultant for a number of corporate DB/DC, endowment/foundation and public fund retirement plans. Before moving into a client advisory role, Matt was a member of Hewitt EnnisKnupp's

defined contribution research group.

Matt is a member of the Defined Contribution Institutional Investment Association (DCIIA) and is a member of its Retirement Income Committee. He is also DCIIA's Texas Regional Ambassador. Matt is a member of Association of Investment Sales and Marketing (AIMSE) and is the Texas Regional Coordinator for events.

Matt holds a BA in economics from the University of Iowa and an MBA in finance from Loyola University Chicago.



Laura Pollock

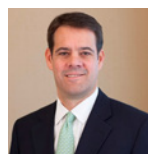
Founding Partner

Third Street Partners

Laura is a strategic advisor to leading asset management firms and their top performing executives. With over fifteen years of dedicated asset management search experience at both large and small firms, she built a firm founded on best practices and trusted relationships.

Laura has conducted senior-level searches in investment management and has worked closely with global investment management organizations. Most recently, Laura was a partner at David Barrett Partners. Previously, she was a senior member of the Asset & Wealth Management Practice at Russell Reynolds Associates in Boston and New York. She began her career in investment banking and asset management at Friedman, Billings and Ramsey.

Laura received her BS from the University of Kentucky. She lives in New Canaan, Connecticut with her husband, three daughters and a Labrador retriever, a former guide-dog-in-training who now serves as head of play-date coordination.



Kevin Quirk

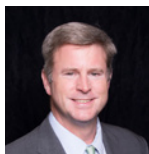
Principal

CaseyQuirk by Deloitte

Kevin, a principal with Deloitte Consulting LLP in the Casey Quirk by Deloitte practice, has more than 25 years of experience in the asset and wealth management industry. He oversees many key client relationships and plays a highly active role in developing cutting-edge thought leadership.

Kevin's primary responsibilities are client-facing, personally advising CEOs and executive teams of leading asset and wealth management firms on their most pressing strategic issues. His areas of focus include global business strategy development, Mergers and Acquisitions/integration advisory, distribution organization design, investments capability assessment, and strategy.

Prior to Deloitte, Kevin was the Chairman and founding managing partner of Casey Quirk. He earned a master's degree in business administration from the Stern School of Business at New York University and a bachelor's degree in political science from Providence College, where he is a member of the board of trustees.

**Chris Rae**

Founder & Managing Director

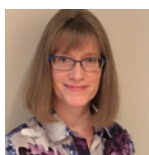
Elevation Marketing Advisory

Chris is Founder and Managing Director of Elevation Marketing Advisory, an outsourced marketing and client service business. Elevation Marketing Advisory, established in February 2016, is a business division of Elevation LLC, a Charlotte-based broker-dealer. In addition to its marketing advisory and execution businesses, Elevation LLC has an exclusive distribution arrangement with Variant Perception, a leading provider of cross-asset class, data-driven market commentary and research.

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

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

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

**Celeste Reese**

Treasury Manager, Retirement Assets

Celanese

Celeste Reese has been with Celanese for sixteen years and oversees the retirement investments for two US and two Canadian defined benefit plans. Additionally, she is responsible for daily investment and administrative oversight for two defined contribution plans in the US and Canada. Celeste has worked in various pension/savings investment roles for several years. Prior to her work with benefit plans, Celeste held diverse Treasury roles within Celanese including commercial credit, FX hedging and debt management. Before starting with Celanese, Celeste held multiple financial roles with Dell Financial Services L.P. and Dun & Bradstreet Corporation. Celeste earned BS and MBA degrees and a Certified Treasury Professional (CTP) designation.

**Mark Robertson**

Director of Business Development

Proprietary Capital, LLC

Mr. Robertson joined Proprietary in 2008 and serves as the Director of Business Development. Mr. Robertson is responsible for marketing, investor relations, and communications activities. Prior to joining Proprietary Capital, Mr. Robertson was the COO and a founding partner of Silvergate Capital Management, a Denver based health care hedge fund. Prior to Silvergate, Mr. Robertson was a Vice

President at Morgan Stanley in New York City where he worked in the Institutional Equity Division. Mr. Robertson started his career in investment management at Paine Webber selling the firm's diversified research products. Mr. Robertson earned a Bachelor's degree in Business Administration, with a concentration in finance, from the University of Vermont. Mr. Robertson serves as a board member on the Association of Investment Management Sales Executives (AIMSE).

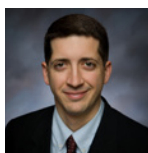


Robert Russell

Portfolio Manager

Formerly Harvard Management Company

Mr. Russell was a Portfolio Manager in the external management group and member of the portfolio committee at Harvard Management Company, the investment manager that oversees the endowment and other assets for Harvard University. At Harvard Management Company, Mr. Russell was responsible for the management and oversight of Harvard's external hedge fund and global equity investments, a portfolio with over \$10 billion in assets, including all aspects of manager sourcing, investment due diligence and structuring of investments in the portfolio. Mr. Russell was responsible for strategic, due diligence, legal and structuring aspects of manager search and selection. Mr. Russell also served as a Portfolio Manager for Harvard Master Trust, an ERISA pension plan with over \$900 million of assets. Mr. Russell was actively involved in the shaping and streamlining of Harvard Management's risk and technology platforms. Most recently, Mr. Russell was a Senior Portfolio Manager at Avenue Capital Group for the Avenue Strategic Partners funds, an event driven credit fund of funds, and was responsible for the investment and business related activities for the group. Prior, Mr. Russell was a Principal and Portfolio Manager in the Fundamental International Equity Research Group at State Street Global. At State Street Global, Mr. Russell managed long only non-U.S. developed-market equity portfolios and had fundamental research responsibilities for a universe of non-U.S. developed-market equities. Prior to State Street Global, Mr. Russell was at Eaton Vance Management where he had several roles, the most recent was in the firm's equity research division as an Assistant Vice President and Equity Research Analyst where he focused on international equities.



David Sancewich

Managing Director

Pension Consulting Alliance

Mr. Sancewich joined PCA in 2004 and provides consulting services for PCA clients across all asset classes, as well as conducting both traditional and hedge fund/absolute return strategy research. Consulting services include risk budgeting, investment policy and guideline development, portfolio and manager attribution analysis, asset class structural reviews, investment manager searches, and performance monitoring. Mr. Sancewich also conducts traditional and alternative manager due diligence.

Previously, Mr. Sancewich worked at Windermere Investment Consulting as an Analyst, where he focused on performance measurement analysis, traditional manager research, and day-to-day support of client specific issues.

Prior to that, Mr. Sancewich worked as an Analyst for the Russell Investment Group, where he evaluated various U.S. equity products for Russell's manager research group. Mr. Sancewich also advised large institutional clients on manager selection, as well as Russell's multi-manager funds business. He also helped work on the structure of Russell's equity, taxable, and alternative investment products.

Mr. Sancewich earned a MBA as well as a Bachelor of Arts degree in Business Management from Washington State University.



Dr. Amita Schultes

Managing Director, Asset Management
Perella Weinberg Partners

Dr. Amita Schultes is a Managing Director at Perella Weinberg Partners and a member of the Investment Team of Agility. In this role, Amita is responsible for leading client relationships and contributing to the research effort.

Amita has more than 21 years of investment experience. Prior to joining Perella Weinberg Partners in October of 2017, Amita was at Colonial Consulting from 2002 to 2017, where she most recently served as a Partner and Senior Consultant responsible for serving as the sole investment consultant to numerous non-profit institutional investors and pension plans. She was previously a Senior Consultant of Ibbotson Associates, where she developed asset allocation programs for asset management companies, insurance companies and broker dealers. Amita began her career as an Investment Consulting Analyst at Salomon Smith Barney.

Amita earned a B.A. and M.A. in Economics from the University of Illinois at Chicago, an M.S. in Financial Markets and Trading from the Illinois Institute of Technology, and a Ph.D. in Finance/Applied Management and Decision Sciences from Walden University. She has served on the Board of the Service Program for Older People, the Bronx Lighthouse Charter School and on the Family Advisory Council of the Komansky Center for Children's Health at New York Presbyterian Hospital/Weill Cornell Medical Center.



Rachel Serna*

Director, Consultant Relations
Lord, Abbett & Co. LLC

Rachel Serna is a Director on Lord Abbett's dedicated Consultant Relations team, which serves the distinct needs of institutional consultants and research analysts. Ms. Serna joined Lord Abbett in 2016. Her previous experience includes serving in roles as Vice President, Global Consultant Relations at BlackRock; Relationship Manager, Key Accounts at Goldman Sachs Asset Management; and in Private Wealth Sales and Sub-Advisory Sales at Alliance Bernstein. She has worked in the financial services industry since 2006. Ms. Serna earned a BA in economics and political science from Rutgers University.



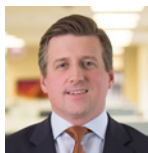
Dr. Matthew Sherwood

Director, Public Markets Investments
MMBB Financial Services

Dr. Matthew Sherwood is an accomplished investment professional with a strong track record of success. Dr. Sherwood began his asset management career at Morgan Stanley, where he managed investments in the Private Wealth Management business unit. Dr. Sherwood left Morgan Stanley for a full discretion Portfolio Manager position at Access Global Partners, where he was responsible for allocating capital across all asset classes. Dr. Sherwood left Access Global Partners to pursue a Senior Portfolio Manager position at The Schonfeld Group, before obtaining the Chief Strategist position at Ivy Strategy, and now he is the Head of Public Markets and Hedge Funds at MMBB Financial Services.

Dr. Sherwood graduated Summa Cum Laude from the Honors Program at Liberty University in an accelerated three years. He went on to obtain his Masters of Business Administration, where he studied Finance and Economics, and graduated with honors. Sherwood has studied business quantitative

methods and economic theory on the doctoral level, and obtained his Doctor of Philosophy in Business Administration from Northcentral University. Dr. Sherwood is an appointed Fellow in Business and Finance and an adjunct faculty member at the King's College, and a guest lecturer at Columbia University, where he lectures on Finance, Economics, and Derivatives. Sherwood is also an Investment Committee member and a member of the ESG/SRI Working Group for the Plan Sponsor Council of America (PSCA).



David Smith, CFA

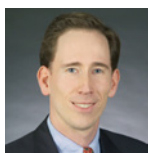
Managing Partner

Marquette Associates

David H. Smith is a managing partner for Marquette Associates. An owner of the firm, Dave has been with the company since 2009 and has 21 years of investment experience. He serves as the lead investment consultant on several client relationships. He also serves as the vice chair of the firm's traditional investment manager search committee and the defined contribution services committee.

Prior to joining Marquette, Dave was a vice president of investor relations at Northern Trust Global Investments where he was responsible for developing business among significant institutional investors. He began his career at the Chicago Mercantile Exchange with a derivatives trading firm.

Dave holds a B.S.B.A. in finance from the University of Richmond and an M.B.A. in finance from the University of Chicago's Booth School of Business. He is a CFA charterholder and a member of the CFA Society of Chicago. Dave is co-chair of the Investment Management Alumni Roundtable at the University of Chicago's Booth School of Business and serves on The Goodman Theater Scenemakers Board. Dave was named as a 2013 Rising Star of Public Funds by Money Management Intelligence.

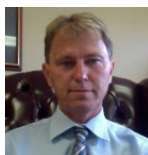


Reid Smith, CAIA

Principal, Head of Private Equity

Mercer

Reid is a Principal in the private markets group at Mercer based in Norwalk, CT. He advises the firm's clients on private markets investments including buyouts, venture capital and other non-traditional private investments. This includes advising on portfolio strategy and implementation, assessing and recommending specific funds, directing client searches and evaluating trends and opportunities across this spectrum. Previously, he was the Director of the private markets research group at Evaluation Associates and was at General Atlantic Partners, a global private equity firm, where he was involved in investing across technology sectors. He also worked in the Bank Debt Group at Goldman Sachs and was an equity analyst at Value Line, an equity research firm. He is a Chartered Alternative Investments Analyst, and has an MBA from the Kellogg School of Management and a BA from Southern Methodist University.



Steven Smith

Administrator

West Virginia Laborers Trust Funds

Mr. Smith is the Administrator of the West Virginia Laborers Trust Funds in Charleston, WV. This encompasses a Self Insured Health Insurance Fund, a Defined Benefit Pension Plan, and a Defined

Contribution Plan. The three funds are approaching 600 million dollars in the aggregate. He also is a Director at CAMC Hospital where he sits on the Finance Committee, a Trustee for the West Virginia Investment Management Board where he is the Chairman of the Private Equity Committee, and an advisory Board Member for Community Trust Bank- a ten billion dollar bank holding company. Mr. Smith is a CPA and holds an MBA from West Virginia Wesleyan. He was formerly a Bank President before coming into the Employee Benefits arena.



Ken Souza

Investment Director

University of South Florida Foundation

Ken Souza joined the USF Foundation in December of 2008. He had previously worked for the asset management arm of Fidelity Investments and in insurance portfolio investing for New York Life. As the Foundation's investment director, he oversees over \$600 million in endowment and operating pool assets. This role includes leading investment initiatives, coordinating research with the Foundation's investment consultant, conducting due diligence on current and prospective managers, and reporting to the Foundation's Investment Committee.

Ken graduated from Merrimack College in 2000 and obtained an MBA from Suffolk University in 2005. Ken also serves on the advisory board for the Student Managed Investment Fund in the USF Muma College of Business and is an investment committee member for the Hillsborough Education Foundation and the Tampa Bay History Center Foundation.



Geoff Strotman, CFA

Vice President, Alpha Research

Segal Marco Advisors

Mr. Strotman serves as a Vice President in Segal Marco Advisors' Chicago office. He is a member of the Investment Committee and Alpha Manager Review Committee, which oversees manager selection. He is also responsible for providing support to firm consultants and clients. Prior to joining Segal Marco Advisors, Mr. Strotman was responsible for traditional asset research at another investment consulting firm. Mr. Strotman received his BBA in Accounting from the University of Notre Dame and his MBA with concentrations in Finance, Economics and International Business from the University of Chicago – Booth School of Business. Mr. Strotman is a CFA Charterholder and a member of the CFA Institute and the CFA Society of Chicago.



Mark Sullivan

Partner, Head of Client Service & Marketing

Bridgeway Capital Management

Mark leads Bridgeway's Client Service and Marketing team. Before joining Bridgeway, he was the Director of Institutional Sales and Relationship Management at Stralem & Company. Mark has deep experience working with institutional investors and their consultants. He brings over thirty years of client service, sales and consultant relations experience at several leading asset management firms, including AB Global and Nicholas-Applegate Capital Management. Mark attended the United States Military Academy at West Point, and earned a B.S. in Languages and Linguistics from Georgetown University. He is involved in charities that focus on education, hunger, and Veteran's causes.

**Brett Taylor**

Director, Global Investments (Former)
Coca-Cola Company

Brett joined The Coca-Cola Company in 1991 in the international audit group. He then moved to the Treasury group in 1995, where he fulfilled several different roles and responsibilities. In his most recent role, he headed up the group that is responsible for managing the investments of the Company, including pension assets, corporate assets and the assets of the insurance captives.

Prior to joining The Coca-Cola Company, Brett worked in the auditing practice of Arthur Young & Company in Cape Town, South Africa.

Brett is a graduate from the University of Cape Town. He is a Chartered Accountant (South Africa).

**Robert Thompson, CFA**

Senior Portfolio Manager, Credit
UPS Group Trust

Robert Thompson is a Senior Portfolio Manager responsible for Credit for the UPS Investments Group. In this role, Robert has responsibility for the plan's Credit investments capturing both Private and Public exposures. Robert's role includes strategic and tactical asset allocation decisions, manager selection and due diligence, and performance monitoring. He joined UPS in July 2011 and was previously a Portfolio Manager at ING Investment Management for five years. He has fifteen years of investment experience and is a CFA charterholder. He graduated with an MBA from Wake Forest University and a BS in Management from Georgia Tech.

**Tod Trabocco, CFA**

Managing Director, Head of Private Debt
Cambridge Associates

Tod Trabocco, CFA, is a Managing Director at Cambridge Associates based in Boston. He oversees the firm's private credit efforts, performing due diligence on investment opportunities in structured equity, credit, and distressed markets, as well as monitoring investment firms and their portfolio companies. Tod co-chairs Cambridge Associates' Credit Investment Research Committee and co-leads the firm's Credit Investment Group's manager research and selection and provides specialized credit services to clients. He also sits on the Consultant Advisory Board of the Alternative Investment Forum, an independent economic think tank focusing on institutional investment policy.

Before joining Cambridge Associates, Tod was a Managing Director with Kayne Anderson Capital Advisors' middle market mezzanine strategy in New York. Previously, he was a Managing Director at LBC Credit Partners, Inc., where he started and led LBC's research and underwriting practices, and was a member of the firm's Investment Committee. He also was Vice President and Senior Analyst at Moody's Investors Service where he developed a new quantitative scoring method for state-level issuers.



Christophe Truong, CFA

Manager, Investments

Air Canada Pension Investments

Christophe manages the equity long/short hedge fund, private equity fund and co-investment programs at Air Canada Pension Investments (ACPI). ACPI is a team of 46 professionals managing Air Canada's \$15bn corporate pension fund based out of Montreal, Quebec, Canada. Christophe was part of the new team hired in 2009 who successfully turned around the pension fund which went from showing a \$2.7bn deficit in 2009 to a \$2.0bn surplus in 2018.

Prior to joining Air Canada, Christophe interned at Barclays Wealth Management in Paris, TD Asset Management in Toronto and Mercer Investment Consulting in Montreal. Christophe holds a Bachelor of Commerce degree from Concordia University and a Master of Business Administration degree from McGill University. Christophe has been a CFA charterholder since 2014.



Michael Tudor, CFA

Principal Investment Analyst

NextEra Energy

Michael has been with NextEra Energy since 2014 and is responsible for oversight of NextEra's \$14 billion in trust fund investment assets, including its defined benefit & defined contribution plans and nuclear decommissioning trust portfolios. Prior to NextEra, he spent 13 years with Wilshire Associates in both its Consulting and Funds Management divisions, working with large institutional investors on asset allocation, investment manager due diligence and team optimization. He also co-founded a start-up investment firm, focusing on global real estate securities for off-shore individual investors. He holds a BSBA from the University of Delaware and an MBA from Vanderbilt University. Michael is a CFA charterholder and a member of the CFA Society - South Florida.



Catherine Ulozas

Chief Investment Officer, Vice President

Drexel University

Currently the Chief Investment Officer at Drexel University in Philadelphia, PA, Catherine has had significant positive impact during her seven and half year tenure. She has repositioned the portfolio assets into a more stable structure and with positive returns and for the University's 2017 fiscal year her performance ranked in the 11th percentile of all endowment and foundations in the Wilshire TUCS Universe. She has improved the manager selection process, reduced fees and streamlined operations. Key factors in her work have been the analysis of the portfolio's liquidity and risk. Catherine is also an adjunct faculty in the Drexel Le Bow School of Business teaching Financial Markets and Institutions and works extensively with faculty and students on investment related learning initiatives. She is a frequent speaker at investment conferences and has appeared on Bloomberg TV. Catherine was named a Rising Star of Endowment Management by Endowment and Foundation Magazine in 2012.

Her extensive investment experience includes portfolio management, trading and credit analysis. Previous work experience includes ING Direct, Aetna, London Life Reinsurance and the Arizona State Retirement System. She is also currently a Director of the Franklin Mint Federal Credit Union and a member of the Asset/Liability Committee of a local community bank, Penn Community.

Catherine dedicates her personal time to non profit organizations including Clarifi, a non-profit community resource devoted to Lifelong Financial Literacy for consumers and is on the advisory council of Green Light, an organization that aims to transform the lives of children in Philadelphia high-poverty urban areas by creating local infrastructure. Previously, she has served on the board of the Career Wardrobe, the Rock School of Ballet and on the investment committee of the Philadelphia Horticultural Society.

Catherine holds an MBA in International Business from George Washington University and BA in Economics and Political Science from Drew University.

Frank Valle, CFA, CAIA

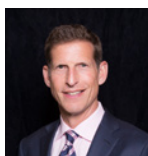
Consultant, Fixed Income Research

Aon Hewitt

Frank serves as a Senior Consultant within Aon Hewitt Investment Consulting's Fixed Income Research investment group in our Chicago, Illinois office. He is responsible for conducting investment due diligence and performance monitoring on fixed income mandates. He joined the legacy firm Ennis Knupp + Associates in 2010.

Over the last 7 years with Aon Hewitt, Frank has developed a specialized focus on fixed income research and client management. Prior to transitioning to Fixed Income Research, Frank served as a support consultant for a number of the firm's retainer and project clients. Since joining fixed income, Frank has focused on Credit, LDI, and Multi-Sector mandates. In addition, Frank has extensive experience across the spectrum of fixed income.

Prior to joining the firm in 2010, Frank was a trader for LaSalle Futures Group at the Chicago Board of Trade. His primary focus was on financial and index products. Frank holds a Bachelor's of Business in Finance from Western Illinois University, and a Masters of Business Administration with concentrations in Analytic Finance, Strategic Management, Economics, Managerial & Organizational Behavior, and Econometrics & Statistics from The University of Chicago Booth School of Business. He has earned the right to use the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations.

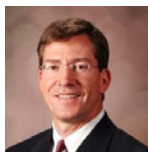


Greg Weissman

Consultant Relations Director

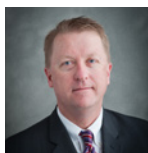
Putnam Investments

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.

**Mark Waite**

Director, Endowment Investments
University of Utah

Mark's current responsibilities include overseeing the endowment's private capital portfolio, (PE, VC, energy, RE, infrastructure, etc.) He has sourced and analyzed manager and fund opportunities globally, with emphasis on identifying unique and uncorrelated investments. His background includes 25 years experience in investment management and corporate finance. Mark is a CPA and received his bachelor's degree in business from The University of Utah.

**Mark Williams**

Managing Director, Head of Private Real Assets
Cliffwater LLC

Mark is a Managing Director of Cliffwater LLC. At Cliffwater, Mark is responsible for producing private real asset research, investment recommendations, portfolio construction, and fund monitoring on behalf of institutional investor clients. Mark is focused on real assets including private energy, infrastructure, metals and minerals, agriculture, and timber funds globally. Prior to joining Cliffwater in 2008, Mark was a Managing Director and principal of Wilshire Associates. Working with the firms plan sponsor clients he performed real estate research and consulting services. Additionally, he managed the development of and provided client service for the Compass institutional investment software product used by over 100 private and public pensions, foundations, endowments, and insurance companies. Previous experience also includes real estate feasibility and research studies for master planned residential communities in Southern California with The Meyers Group a real estate research firm, and nationwide site acquisition for warehouse development for the CJ Bonner Corporation a real estate development and management company.

He earned a B.S. in Finance from the University of Utah.

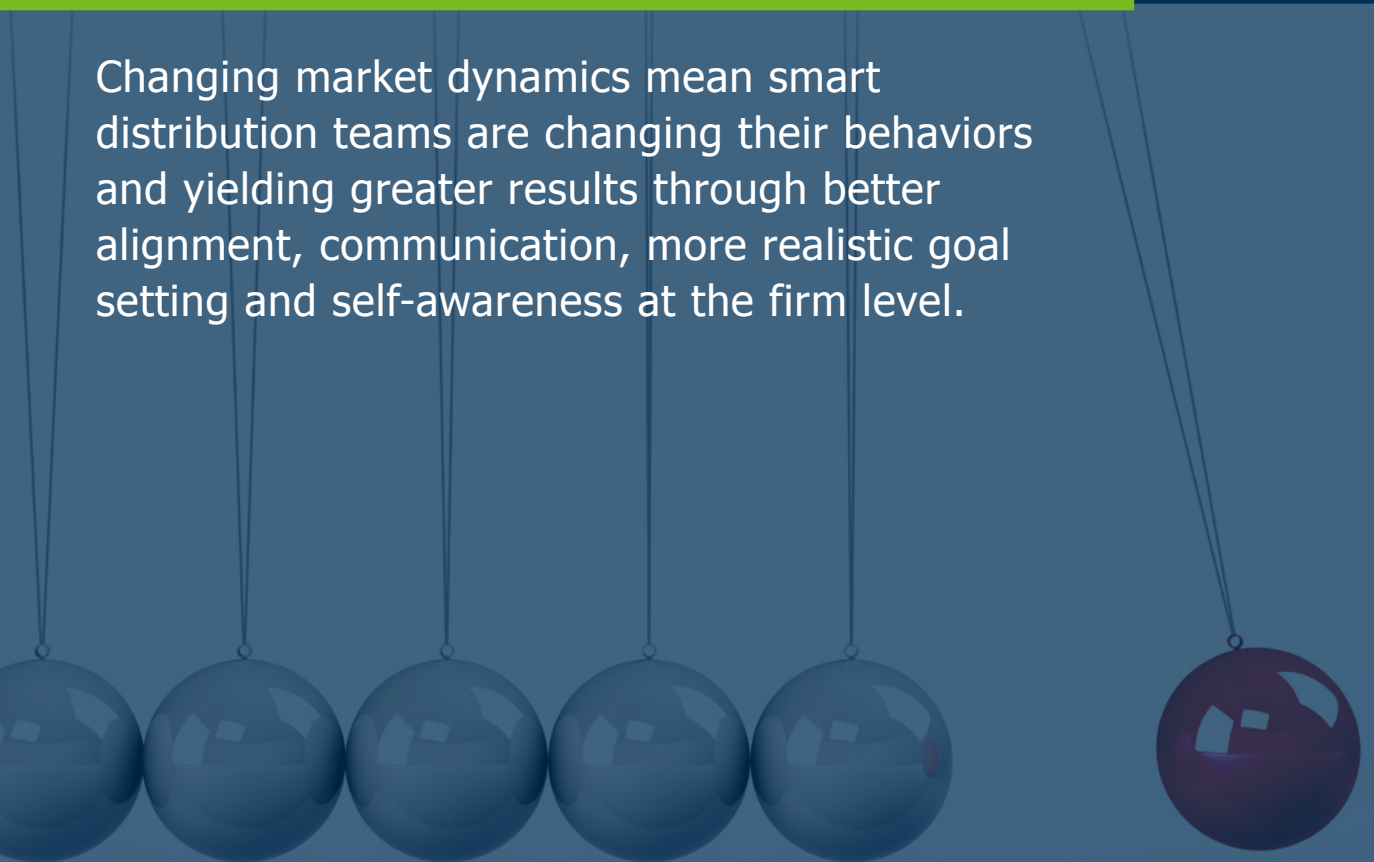
**Keith A. Wosneski***

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

Keith joined Mackenzie Investments in April of 2018. Prior to joining Mackenzie Investments Keith served as a Consultant Relations Officer at Acadian Asset Management. Previous experience includes working with institutional clients in a variety of sales and client service roles at Mercer, Aurora Investment Management LLC, Northern Trust Global Investments, and Barclays Global Investors. Keith earned an M.B.A. from the University of Notre Dame and holds a B.S.B.A. in international business from the University of Denver.

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The logo for Callan, featuring the word "Callan" in a dark blue, serif font.

Callan was founded as an employee-owned investment consulting firm in 1973. Since then, we have empowered institutional investors with creative, tailored strategies that are backed by proprietary research, an industry-leading database and ongoing education. We use a client-focused consulting model to serve public and private pension plan sponsors, endowments, foundations, operating funds, smaller investment consulting firms, investment managers, and financial intermediaries.

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Institutional Investor

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MandateWire

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Pensions & Investments

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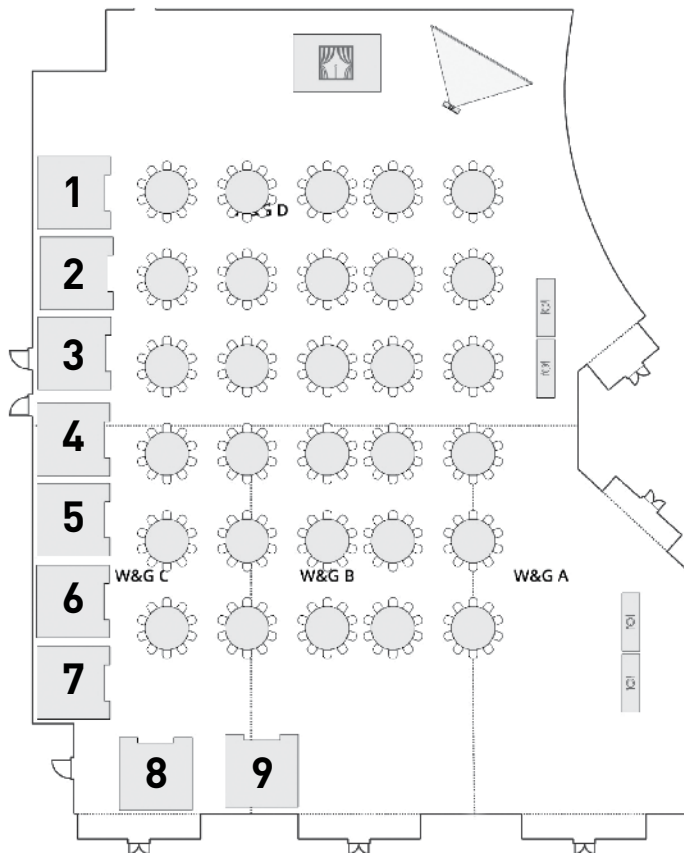
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EXHIBITOR LISTING

Booth 1
FINsearches

Booth 2
Institutional Investor

Booth 3
S&P Money Market Intelligence

Booth 4
Satuit Technologies

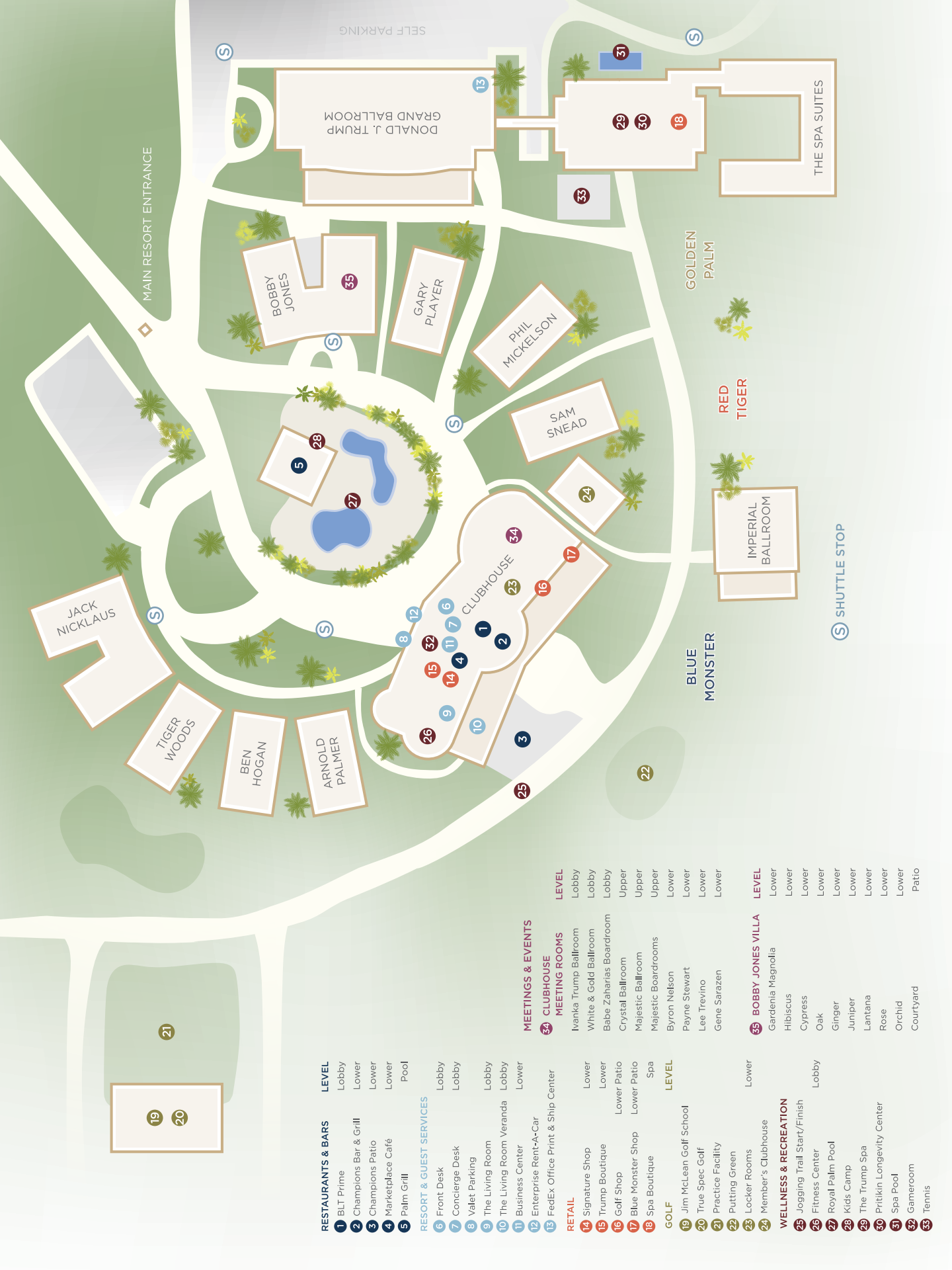
Booth 5
Callan

Booth 6
Fundmap

Booth 7
MandateWire

Booth 8
Pensions & Investments

Booth 9
eVestment



RESTAURANTS & BARS

- 1 BLT Prime Lobby
- 2 Champions Bar & Grill Lower
- 3 Champions Patio Lower
- 4 Marketplace Café Lower
- 5 Palm Grill Pool

RESORT & GUEST SERVICES

- 6 Front Desk Lobby
- 7 Concierge Desk Lobby
- 8 Valet Parking Lobby
- 9 The Living Room Lobby
- 10 The Living Room Veranda Lobby
- 11 Business Center Lower
- 12 Enterprise Rent-A-Car
- 13 FedEx Office Print & Ship Center

RETAIL

- 14 Signature Shop Lower
- 15 Trump Boutique Lower
- 16 Golf Shop Lower Patio
- 17 Blue Monster Shop Lower Patio
- 18 Spa Boutique Spa

GOLF

- 19 Jim McLean Golf School
- 20 True Spec Golf
- 21 Practice Facility
- 22 Putting Green
- 23 Locker Rooms
- 24 Member's Clubhouse

WELLNESS & RECREATION

- 25 Jogging Trail Start/Finish
- 26 Fitness Center
- 27 Royal Palm Pool
- 28 Kids Camp
- 29 The Trump Spa
- 30 Pritikin Longevity Center
- 31 Spa Pool
- 32 Gameroom
- 33 Tennis

MEETINGS & EVENTS

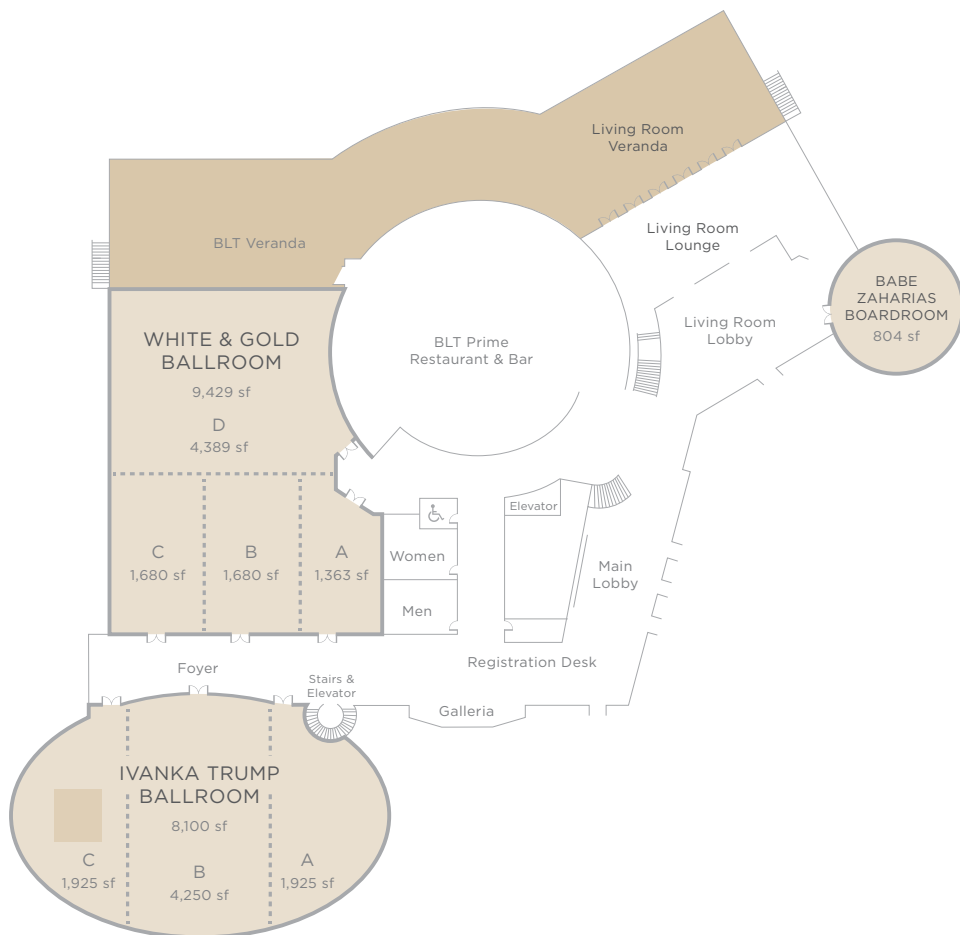
34 CLUBHOUSE

- Ivanka Trump Ballroom Lobby
- White & Gold Ballroom Lobby
- Babe Zaharias Boardroom Lobby
- Crystal Ballroom Upper
- Majestic Ballroom Upper
- Majestic Boardrooms Upper
- Byron Nelson Lower
- Payne Stewart Lower
- Lee Trevino Lower
- Gene Sarazen Lower

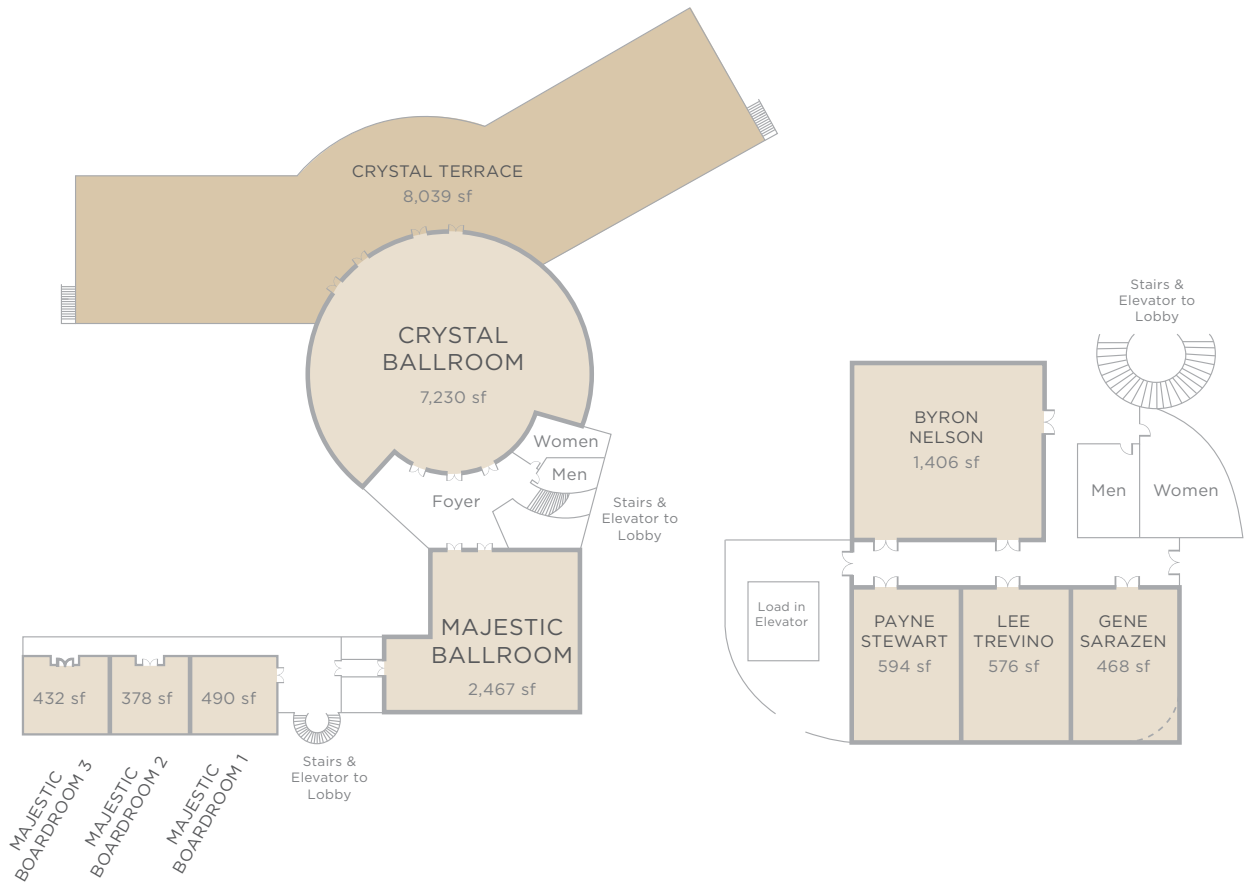
35 BOBBY JONES VILLA

- Gardenia Magnolia Lower
- Hibiscus Lower
- Cypress Lower
- Oak Lower
- Ginger Lower
- Juniper Lower
- Lantana Lower
- Rose Lower
- Orchid Lower
- Courtyard Patio

FLOOR PLANS



LOBBY LEVEL RESORT CLUBHOUSE



LOWER LEVEL RESORT CLUBHOUSE

SAVE THE DATE FOR THESE UPCOMING AIMSE EVENTS!

2018 AIMSE Fall Conference

October 10-11, 2018
The Westin New York at Times Square
New York, New York

26th Annual AIMSE Canadian Conference

January 16-17, 2019
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April 28-April 30, 2019
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