

A man in a light-colored, long-sleeved shirt and trousers is walking on a red carpet. He is carrying a dark jacket over his shoulder and a briefcase in his right hand. The background is a blurred red wall.

# AHEAD OF THE CURVE

## **AIMSE 2017**

Fall Conference  
October 11–12  
Princeton Club  
New York

CONFERENCE  
PROGRAM



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As a participant in the CFA Institute Approved-Provider Program, AIMSE has determined that this program qualifies for 5 credit hours. If you are a CFA Institute member, credit for your participation in this program will automatically be recorded in your CE tracking tool.

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Activity



CFA Institute

# AGENDA

OCTOBER 11, 2017

12:00 pm – 6:00 pm **Registration**

1:15 – 1:30 pm

**Welcome Remarks**

*James Madison Room*

CONFERENCE CO-CHAIRS

**Tim Hill**

Vice President, Sales & Marketing  
Q- Emerging Markets Corp.

**Michael Gillis**

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

AIMSE PRESIDENT

**Carolyn Patton, CFA**

Head of Distribution Americas  
First State Investments

1:30 – 2:10 pm

**What's Going On?**

*James Madison Room*

To kick off the conference we will hear from leading industry thinkers about the state of the industry today and where it is headed tomorrow. What are investors thinking given the ever-changing global investment landscape and how will that lead to changes in portfolio allocations?

MODERATOR

**Bart Marchant**

Institutional Regional Director, Southeast  
WisdomTree Asset Management

SPEAKERS

**Safia Mehta, CFA**

Senior Vice President, Portfolio Manager  
Progress Investment Management Company, LLC

**Timothy Ng**

Chief Investment Officer  
Clearbrook

**Timothy Taylor**

Senior Investment Officer, Global Equity  
Florida State Board of Administration

**Mark Yusko**

Chief Executive Officer & Chief Investment Officer  
Morgan Creek Capital Management

2:15 – 3:10 pm

## **New York State of Mind**

*James Madison Room*

With over a trillion dollars of investable assets in pension plans, endowments, foundations and family offices, the State of New York is home to one of the largest pools of capital available to investment managers. We will hear from some of the largest allocators in the state discussing investment trends, opportunities and specific details for the future of their plans.

### MODERATOR

**Larry Pokora**

Global Director of Investor Relations  
LibreMax Capital, LLC

### SPEAKERS

**Sean Crawford, CAIA**

Chief Investment Officer  
State of New York Metropolitan Transportation Authority

**David Ourlicht**

Managing Director & Special Advisor to the Chairman  
GAMCO Asset Management

3:15– 4:00 pm

## **Specialist and Boutique Investment Consultants**

*James Madison Room*

This session will feature a panel of boutique and specialist consultants where you will learn how to stay ahead of the curve by better understanding portfolio positioning, emerging areas of interest, and how you can successfully navigate and partner with these exciting consulting firms.

### MODERATOR

**Derek Tubbs**

Vice President Institutional Development  
CornerCap Investment Counsel

### SPEAKERS

**Martin Sønderskov Nielsen**

President  
Kirstein US LLC

**George Perches**

Senior Vice President, Independent Adviser Group  
Callan Associates Inc.

**Jason Small, CFA**

Partner  
FiduciaryVest

**Christian Thomas, CFA, CIPM**  
Investment Consultant  
USI Consulting Group

4:00– 4:30 pm

**Networking Break with Exhibitors**  
*Alexander Hamilton Room*

4:30 – 6:00 pm

**Investor Roundtables**  
*James Madison Room*

The Investor Roundtables are back! This session will give you access to senior investment professionals for ninety minutes where you will learn what they are doing, seeing, and expecting from their managers. Don't miss this opportunity to stay ahead of the curve as you will have the opportunity to ask questions in a small and intimate setting that has made the roundtables so popular.

MODERATOR

**Adam Gerentine**  
Managing Director  
Trinity Street Asset Management

SPEAKERS

**Thomas Bauer**  
Deputy Chief Investment Officer, Traditional Investments  
Pennsylvania Public School Employees' Retirement System

**Dean Dimizas, CFA**  
Partner & Outsourced Chief Investment Officer  
Cambridge Associates

**Rashid Hassan, CFA**  
Senior Director of Sanofi Pension Advisory  
Sanofi

**Lofton Holder**  
Managing Partner  
Pine Street Alternative Asset Management

**Kristina Matwijec**  
Investment Officer, Alternatives  
Consolidated Edison Company of NY, Inc.

**David Morrell**  
Director of University Benefits  
State University of New York

**Wayne Wicker, CFA**  
Chief Investment Officer  
ICMA-RC

6:00 – 7:00 pm     **Reception**  
*Alexander Hamilton Room*

7:00 – 8:30 pm     **Dinner and Networking**  
*James Madison Room*

Enjoy dinner and networking as you are joined by surprise guests comprised of investment consultants and allocators in a relaxed and friendly environment.

## OCTOBER 12, 2017

7:30 am – 5:30 pm     **Registration**

7:30 – 8:00 am     **Continental Breakfast with Exhibitors**  
*Alexander Hamilton Room*

8:00 – 8:10 am     **Introductory Remarks**  
*James Madison Room*

### CONFERENCE CO-CHAIRS

#### **Tim Hill**

Vice President, Sales & Marketing  
Q- Emerging Markets Corp.

#### **Michael Gillis**

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

8:15 – 9:10 am     **Where Will \$20 Billion be Invested in the Next 365 Days?**  
*James Madison Room*

Where will capital be allocated in the next year? Listen and learn from these family office CIOs and Advisors as to what they like, what they don't like and why. What's a trend, fad or passing infatuation? What's a lasting investment that may well stand the test of time through tough markets? Get inside the minds of these private investors — and get ahead of your competition — with a roadmap for asset allocation and portfolio construction over the next 365 days.

### MODERATOR

#### **Rachel S.L. Minard**

Founder & Chief Executive Officer  
Minard Capital LLC

### SPEAKERS

#### **Dean D'Onofrio, CFA**

Managing Member & Chief Investment Officer  
BEL45 Advisors, LLC

**Donald Motschwiller**  
Chief Executive Officer  
FNY Capital Management LP

**Andrew Parrillo**  
Chief Investment Officer  
Newport Capital Advisers

**Sherry Pryor Witter**  
Chief Investment Officer  
Witter Family Offices

**Randy Slifka**  
Managing Principal  
Slifka Asset Management

**9:15 – 10:00 am**

**The Ever Changing OCIO Landscape**  
*James Madison Room*

The OCIO market today is not what it was five years ago. Meteoric growth has been well documented and is expected to continue. In this session we will explore the history of outsourcing, explore the different OCIO types, and discuss current trends. Then, we will help you stay ahead of the curve by sharing how to best market and partner with OCIO firms so you can both strategically and tactically maximize your engagement.

**MODERATOR**

**Carolyn Patton, CFA**  
Head of Distribution Americas  
First State Investments

**SPEAKERS**

**Brian Binkley, CFA**  
Senior Investment Consultant  
Vanguard Institutional Advisory Services

**Barclay Douglas**  
President  
Criterium Advisors

**Nicole Wellmann Kraus, CFA**  
Managing Director, Global Head of Client Development  
Strategic Investment Group

**10:00 – 10:30 am**

**Networking Break with Exhibitors**  
*Alexander Hamilton Room*

**10:30 – 11:15 am**    **Trends and Macro Factors Impacting the Family Office Industry**  
*James Madison Room*

Family Offices represent an emerging and challenging distribution channel and an opportunity to partner with investors who seek to stay ahead of the curve by being open to innovative managers and mandates. Attend this session and learn about the trends and macro forces impacting Family Offices.

**MODERATOR**

**Jamie McLaughlin**  
Chief Executive Officer & Founder  
J.H. McLaughlin & Co. LLC

**SPEAKERS**

**David Fife**  
Partner  
Next World Evergreen Fund, LP

**Joseph Kusnan**  
General Partner  
DMP Private Management

**11:20 am – 12:10 pm**    **Are Hedge Funds Falling Behind the Curve?**  
*James Madison Room*

With low rates, low volatility, 50% fewer listed companies and increased allocations to private asset classes, how do liquid market participants stay ahead of the curve? How do Hedge Funds stay ahead of machine learning, quant strategies and passive investing? Join us as we explore the leading topics facing Hedge Funds today.

**MODERATOR**

**Tony Buscemi**  
Partner  
Gallatin Capital LLC

**SPEAKERS**

**Ken Lee**  
Director of Investments  
Carnegie Corporation of New York

**Matthew Mordus, CAIA**  
Director, Alternatives  
XL Group Investments LLC

**Chris Solarz, CFA, CPA, CAIA**  
Managing Director  
Cliffwater LLC

**Viktor Ula**  
Managing Principal  
PivotalPath

**12:15 – 1:30 pm**

**Networking Lunch with Exhibitors**

*Alexander Hamilton Room*

Take advantage of this opportunity to network with your peers and learn how they are staying ahead of the curve and executing sales and service best practices.

**1:30 – 2:20 pm**

**The Expert Panel with Investment Strategists: Seeing What Others Cannot**

*James Madison Room*

Judgment, experience, time, new approaches to old problems: meet the investment experts charged with charting a new course for investment management. Active vs. passive, long vs. short, historical vs. prescient, quant vs. discretionary — we'll tackle it all in this high-energy, high EQ/IQ panel. Find out where the next great idea may come from and how these experts are utilizing their unique set of tools to validate their theses.

MODERATOR

**Rachel S.L. Minard**  
Founder & Chief Executive Officer  
Minard Capital LLC

SPEAKERS

**Dr. Desmond Lun**  
Chief Executive Officer & Chief Investment Officer  
Taaffeite Capital Management

**Roy Niederhoffer**  
President  
R.G. Niederhoffer Capital Management, Inc.

**David Readerman, CFA**  
Managing Member  
Endurance Capital Partners, LLC

**Dr. Patrick Welton**  
Chief Executive Officer & Chief Investment Officer  
Welton Investment Partners

**2:25– 3:15 pm**

**Investors in Jeopardy**

*James Madison Room*

What is a session you can't miss? Come be part of a live studio audience and watch three industry experts compete and share their insights. The tables are turned, as we have the answers and the contestants have the questions. In

this fast paced and fun format, the contestants will educate the audience on numerous topics such as asset flows, industry trends, best sales practices, and much more. Don't jeopardize your career growth by missing this one!

MODERATOR

**Kurt Terrien**

Director, Institutional Business  
Clarkston Capital Partners, LLC

SPEAKERS

**Clay Bradley**

Managing Partner  
FDB Group LLC

**Jeff Sutton, CFA**

Managing Director  
Oppenheimer Asset Management Inc.

**Ron Thompson, CFA, CAIA**

Manager, Pension Asset Management  
Rockwell Automation

3:15 – 3:45 pm

**Networking Break with Exhibitors**

*Alexander Hamilton Room*

3:45 – 5:15 pm

**Consultant Roundtables**

*James Madison Room*

One of the most highly anticipated sessions of the Fall Conference, the roundtables give you the opportunity to interact directly with a mix of traditional, alternative and OCIO consulting professionals. Enjoy direct dialogue with experienced individuals as they provide organizational updates, discuss strategic research themes, and share search activity specific to each firm's unique client base. Understand how to navigate each organization, as well as their preferred communication practices in order to improve the quality of future interactions. AIMSE is dedicated to keeping each rotation intimate to encourage candid conversations. No formality — just you and your fellow marketers with an open forum and opportunity to increase your effectiveness as a marketer and your company's chances to become a valued partner.

MODERATOR

**Tasleem Jamal, CFA**

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

SPEAKERS

**Edwin Boyer**

Principal & Senior Consultant  
Asset Strategy Consultants



# AHEAD OF THE CURVE

**Julie Moore**

Founding Partner & Head of Global Equity Research  
Rocaton

**Kweku Obed, CFA, CAIA**

Managing Partner  
Marquette Associates

**Michael Perdzock**

Research Director of Traditional Investments  
GAVION LLC

**Rhoda Shapiro**

Principal  
Mercer

**Daniel Tarlas, CFA**

Senior Managing Director  
Asset Consulting Group

**Eric Thielscher, CFA**

Managing Director  
Cambridge Associates

**Lori Wallace**

Research Director, Global Equity  
Pavilion Advisory Group Inc.

**Annoesjka West**

Senior Vice President & Plan Sponsor Consultant  
Callan Associates Inc.

5:15 – 5:25 pm

**Closing Remarks**

*James Madison Room*

CONFERENCE CO-CHAIRS

**Tim Hill**

Vice President, Sales & Marketing  
Q- Emerging Markets Corp.

**Michael Gillis**

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

AIMSE PRESIDENT

**Carolyn Patton, CFA**

Head of Distribution Americas  
First State Investments

5:25 – 7:00 pm

**Closing Reception**

*Alexander Hamilton Room*

# CONFERENCE CHAIRS



## TIM HILL

### Co-Chair

Vice President, Sales & Marketing  
Q- Emerging Markets Corp.

Timothy Hill is a Vice President for Q – Emerging Markets Corp, responsible for running all aspects of Sales and Marketing for the firm in North America.

Tim has had a wide variety of experience in multiple parts of the world, multiple asset classes, and multiple roles over his career. Prior to joining Q-Emerging Markets, Tim was Founder and CEO of Icon Global Strategies, an Asset Management Sales and Marketing firm. Prior to Icon Global, Tim was the Global Co-Head of Consultant Relations for Thornburg Investment Management, an asset manager with multiple equity and fixed income strategies. Before Thornburg, Tim was the Head of the US Institutional Group at Mirae Asset, South Korea's largest money manager.

Tim was also a Senior Vice President at Lehman Brothers and Neuberger Berman in their Private Bank, Hedge Fund Group and was Global Co-Head of Sales for LibertyView, Lehman-owned hedge fund.

Prior to his asset management sales career, Tim spent an additional 12 years in the derivatives world, as a prop trader, risk manager, and institutional derivatives salesperson in multiple asset classes for O'Connor and Associates, Swiss Bank Corporation, ABN AMRO and Kovell Calwell LLC in the USA, the UK and Switzerland.

Tim graduated from the Wharton School of the University of Pennsylvania with a BS in Economics in 1990, where he was President of the Class of 1990.



## MICHAEL GILLIS

### Co-Chair

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 (IFEBP). Michael serves on the board of two charities, MAGICANA and Georgetown Walk for Wishes (Ontario).

# Do You Have a Disciplined Approach to Distribution?

Changing market dynamics means smart distribution teams are changing their behaviors and yielding greater results through better alignment, communication, more realistic goal setting and self-awareness at the firm level.



Stop by our booth or catch us during a break to learn how applying a disciplined approach to distribution can be a key competitive advantage in the marketplace.

# MODERATORS, SPEAKERS & CONFERENCE COMMITTEE\*



## GREG BAUER, CFA, CAIA\*

Director, Institutional Services  
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.



## THOMAS BAUER, CFA

Deputy Chief Investment Officer, Traditional Investments  
Pennsylvania Public School Employees' Retirement System

Tom is the deputy CIO – Traditional Investments at Pennsylvania Public School Employees' Retirement System (PSERS) in Harrisburg. Prior to joining PSERS in April 2016, Tom spent 14 years in New York City with a boutique public equity manager. Prior to that, he spent 14 years in various investment roles at a number of insurance companies in the Midwest. Tom grew up in Wisconsin, is a graduate of the University of Notre Dame, and is a holder of the CFA designation.



## BRIAN BINKLEY, CFA

Senior Investment Consultant  
Vanguard Institutional Advisory Services

Brian is a senior investment consultant with Vanguard Institutional Advisory Services (VIAS) where he serves as the outsourced chief investment officer (OCIO) to pensions, endowments and foundations. Brian joined Vanguard with 20 years of broad investment experience. Most recently, Brian was a senior investment consultant at Aon Hewitt Investment Consulting where he advised large plan sponsors on topics including asset allocation, portfolio construction and investment manager selection and monitoring. Prior to Aon Hewitt Investment Consulting, Brian worked at GE Asset Management for over a decade as a client portfolio manager for all international and emerging market equity products that totaled over \$25B in AUM. Previous to his tenure at GE Brian worked at Citigroup Global Asset Management as an assistant portfolio manager within the private bank.

Brian holds an M.B.A. from The University of Connecticut and graduated with honors from Siena College with a B.S. in Economics. Brian is a Chartered Financial Analyst (CFA) charterholder and currently serves on the Board of the CFA Society of Stamford including serving as President of the Board from 2015-2017.



## PATRIK BINKOWSKI\*

Patrik was most recently a Managing Director in Business Development at Capital Dynamics, where he led the firm's U.S. efforts in providing private markets solutions for high net worth clients, family offices, and other distribution channels. Previously, he held key senior positions with Winged Keel and CAIS, where he focused on the U.S Private Client marketplace. His prior experience also includes various roles at Deutsche Bank Absolute Return Strategies Group. Patrik received a BA degree in Finance from Old Dominion University, and holds Financial Regulatory Authority (FINRA) Series 7, and 63 licenses.



## EDWIN BOYER

Principal & Senior Consultant  
Asset Strategy Consultants

Ed is a Principal and Senior Consultant in the Hunt Valley headquarters of Asset Strategy Consultants. He brings over two decades of experience in investment consulting and is a nationally recognized author and expert on client/investment manager relationships. He has been an industry panelist for many alternative investment conferences.

After graduating from the University of Colorado with a Bachelor of Science degree in Business Administration, Ed went into the securities business with Dean Witter in San Francisco. Ed joined ASC in 1992 and has presented seminars on fiduciary and investment management topics sponsored in conjunction with prominent law firms in the Greater Baltimore area. He specializes in evaluating investment management organizations and the risks associated with various structures. Ed has particular expertise in the area of Alternative Investments, such as Venture Capital, Private Equity, Hedge Funds, Real Estate, Natural Resources, etc.

Ed has completed Level I of the Chartered Alternative Investment Analyst designation and attended Callan College for fiduciary training.



## CLAY BRADLEY

Managing Partner  
FDB Group LLC

Clay Bradley has been managing assets for over 30 years. Mr. Bradley served both retail and institutional clients for Merrill Lynch, Bear Stearns, and Oppenheimer. In the mid-1990s, he founded and co-managed an Atlanta-based hedge fund. Since his family office's inception in 1986, he has been a board member and investment officer. His main duties include asset allocation, manager search and due diligence, and interfacing with the legal and accounting professionals the family outsources. Mr. Bradley has founded family office groups around the country for the purpose of information sharing. He is a frequent speaker at industry conferences concerning family office management. He and his wife and three children live in Atlanta.



## 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.



## SEAN CRAWFORD, CAIA

Chief Investment Officer  
State of New York Metropolitan Transportation Authority

Sean Crawford is the Chief Investment Officer for the State of New York's Metropolitan Transportation Authority, which operates the largest transportation network in North America. Sean has the distinction of being named the Authority's first Chief Investment Officer and is tasked with creating an investment culture and infrastructure as he oversees over \$15 billion in defined contribution (401k/457), defined benefit (pensions), health and welfare (OPEB), and insurance assets.

From 2000-2014, Sean held senior positions in manager research with Brown Brothers Harriman, Barclays, Lehman Brothers, and McDonald Investments where he covered all traditional and alternative asset classes and led and developed high performing investment research teams. Also while at Barclays, Sean created, developed, and managed the firm's first proprietary investment strategies offered in the US Market, an ETF Tactical Asset Allocation program and an income-oriented stock portfolio.

Sean began his career as an analyst in corporate bond research at Salomon Brothers in 1997 before moving to National City Bank as a portfolio manager in 1998. He holds both a Bachelor of Arts (Political Science) and a Master of Arts (Political Economy) from New York University. Sean has been a CAIA Charterholder since 2005.



## DEAN DIMIZAS, CFA

Partner & Outsourced Chief Investment Officer  
Cambridge Associates

Dean Dimizas is a partner and Outsourced Chief Investment Officer at Cambridge Associates, managing portfolios for private clients and nonprofit institutions. His clients are based in the US, England, Switzerland, Greece, and Israel. In addition to advising these clients, Dean allocates a meaningful part of his time on manager research, sourcing and evaluating new managers for client portfolios.

Prior to joining Cambridge Associates in 2004, Dean worked as an investment banking summer associate with Goldman Sachs in London while attending business school. He also worked as an Associate Director for four years at EFG Telesis Finance, a leading investment bank in Greece.



## DEAN D'ONOFRIO, CFA

Managing Member & Chief Investment Officer  
BEL45 Advisors, LLC

Dean D'Onofrio is the Managing Member and Chief Investment Officer of BEL45 Advisors, LLC, a single Family Office.

Dean has logged 35 plus years the business, having managed Institutional Asset Management, Hedge Fund and Proprietary Trading business units, as well as the Equity-linked Capital Markets and Equity Derivative Sales and Trading divisions at both Bankers Trust and Merrill Lynch. Following his tenure on Wall St., Dean co-founded both multi-strategy and single-strategy hedge funds, managing assets for large Funds of Funds and Hedge Funds, such as Blackstone and Tudor Investments.



## BARCLAY L. DOUGLAS III

President  
Criterium Advisors

Founded in early 2007, Criterium Advisors is a consulting firm providing investment and strategic counsel to both institutional fund sponsors and money managers. Barclay's prior industry experience separates into three, nearly equal, eight year periods. Joining Kansas City based consultant DeMarche Associates in 1983, Barclay was the lead consultant on 27 institutional relationships. Moving to Philadelphia in 1991 to work for Delaware Investments, his role evolved by 1994 into EVP, responsible for the firm's institutional business. In late 1998 Barclay joined Baring Asset Management as President and CEO, heading their efforts in North America. His primary interests and activities over time have focused on understanding the variety of investment philosophies, approaches, and implementation strategies that correlate to superior performance in total fund portfolios, and the essential qualities in asset managers that drive their ability to generate excess returns. Barclay attended The Ohio State University, the University of Arizona, and graduated from The University of Iowa with degrees in Financial Economics and philosophy.



## DAVID FIFE

Partner  
Next World Evergreen Fund, LP

David Fife is an experienced consumer private equity investor with deep operating and finance experience. Mr. Fife is a Partner at Next World Evergreen, a San Francisco-based investment firm focused on providing growth capital to the consumer sector, with a commitment to the natural products category particularly in the areas of beauty, food, and beverage. The firm operates from a unique structure with \$400mm of evergreen growth equity. We are committed to building durable brands, and we align with entrepreneurs who value our long-term strategic perspective. Our target investment size is typically \$20-30mm, though we have flexibility to scale up or down depending on the opportunity. We seek to partner with strong industry innovators, pioneers and change agents to build brands with lasting value and global potential. Previously, Mr. Fife was a Partner at Sandbridge Capital, LLC where he was on the investment committee of Sandbridge Consumer Fund I, LP. Prior to that, Mr. Fife was a Managing Director and Portfolio Manager at Rosemont Capital, LLC the alternative investment arm of the Heinz Family Office where he was involved in venture capital, growth equity, buyout, and co-investments and served as Portfolio Manager of the firm's private equity fund. Mr. Fife began his career as a Financial Analyst at Goldman Sachs & Co. Mr. Fife has a BA from Duke University and an MA from Columbia University.



## 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.



## ADAM GERENTINE\*

Managing Director  
Trinity Street Asset Management

Adam Gerentine is a Managing Director with Trinity Street Asset Management. His responsibilities include managing key relationships with institutional investors and investment consultants throughout North America. Prior to joining Trinity Street in 2017, Adam was a Director with Tremblant Capital, where he was responsible for managing relationships with institutional consultants and direct plan sponsors. He began his career began with HGK Asset Management where he ultimately was overseeing all aspects of the firm's business development and client service functions. Adam received his Bachelor of Science degree in Business Finance from Rochester Institute of Technology and serves on the Boards of Directors Association of Investment Management Sales Executives (AIMSE).



## RASHID HASSAN, CFA

Senior Director of Sanofi Pension Advisory  
Sanofi

Rashid is a senior director within the Pension Advisory team of Sanofi. His responsibilities include managing Sanofi's defined benefit and defined contribution retirement plans in the U.S., Canada, and Brazil.

Prior to joining Sanofi, Rashid was an investment consultant in Mercer Investments for ten years in New York. He worked with endowment, foundations, insurance, sovereign wealth fund, corporate and public retirement clients in the US, the Caribbean, Europe, Asia, and South America.

Prior to Mercer he was at J.P. Morgan Asset and Wealth Management in New York where he provided manager research for equity asset classes as well as helped manage two multi-manager funds.

Rashid holds a BA in Economics and a BA in Middle Eastern and Asian Languages and Cultures from Columbia College of Columbia University. He is a CFA Charterholder and a member of CFA Society New York.



## LOFTON HOLDER

Managing Partner  
Pine Street Alternative Asset Management

Lofton Holder is a Co-Founding Partner of Pine Street Alternative Asset Management LLC. He was previously Managing Director at Investcorp, where he served the investment needs of large U.S. institutional investors. Prior to joining Investcorp, Mr. Holder spent 13 years with J.P. Morgan Asset Management and five years with CS First Boston. In addition to serving as chairman of the Investment Committee, Lofton serves on the Grants Committees of the Edwin Gould Foundation and has been a long time advocate of Sponsors for Educational Opportunity, working to advance the college and career development of under-represented youth.

He earned an MBA from the Yale School of Management and a BA from Columbia University.



## TASLEEM JAMAL, CFA\*

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

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

she focused on client relationship management and business development for Burgundy's Canadian institutional clients. Ms. Jamal was appointed Vice President of the firm in July 2010.

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

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

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



### MIKE KNAPKE\*

Manager, Marketing & Client Relations  
Opus Capital Management, Inc.

Mr. Knapke manages marketing and client relations for Opus Capital. In this role Mr. Knapke proactively cultivates relationships, collaborates Opus' response to manager searches and business development efforts, engages appropriate firm resources to provide superior client service, and oversees firm-wide marketing efforts.

Mr. Knapke earned his BSBA and MBA in Finance and International Business from Xavier University. Prior to joining Opus, Mr. Knapke held a position as an Association Manager with Towne Properties Asset Management Company and Graduate Assistant at Xavier University. Mr. Knapke is a member of the Association of Investment Management Sales Executives as well as the Mt. Washington Community Council.

### JOSEPH KUSNAN

General Partner  
DMP Private Management

Joseph Kusnan is the General Partner of DMP Private Management- the private investment firm of Terry and Kim Pegula- based in New York. The family office was created in 2010 with the sale of East Resources to Shell in a \$4.7 billion transaction. At the time of the sale, East Resources controlled over 1 million oil and natural gas mineral right acres in the Appalachian Basin, including over 600 thousand acres in the Marcellus Shale. In August 2014, East Resources sold 48 thousand net acres in West Virginia to American Energy Partners for \$1.3 billion. In addition, the Pegula family are the owners of the Buffalo Bills in the NFL, the Buffalo Sabres in the NHL as well as the Rochester Americans and Buffalo Bandits. The family office is active mostly in direct transactions – real estate, direct lending, early- and later-stage venture capital, as well as traditional growth equity and private equity. Previously, Mr. Kusnan was the founder of an investment partnership with offices in New York and London with backing from Highbridge Capital Management, the \$35 billion multi-strategy firm and an affiliate. Before then, he had a series of senior roles at Highbridge Capital and MSD Capital, Michael Dell's family office. He began his career at Mutual Series under

Michael F. Price. He has served on the Boards of KIPP/TEAM Charter Schools, Families for Excellent Schools, Newark Academy, and Harvard College Fund. Joseph was also a founding staff member of Teach For America. Mr. Kusnan received an A.B. in Economics from Harvard, where he graduated in three years.



## NICOLE WELLMANN KRAUS, CFA

Managing Director, Global Head of Client Development  
Strategic Investment Group

Nikki oversees the building of client relationships and drives the firm's marketing strategy. She has more than two decades of experience in the OCIO industry, having most recently served as Director of Institutional Business at Hirtle, Callaghan & Co., where she attracted and serviced a broad range of clients. Before that she held various positions at SEI Investments Company working with OCIO clients.

She has extensive experience advising investment committees, to whom she is often asked to provide insights on best practices and governance. She has also actively collaborated with the National Association of College and University Business Officers (NACUBO) for nearly a decade, including serving as a speaker at multiple NACUBO events. Nikki is the co-author of Endowment Management for Higher Education, a publication released by the Association of Governing Boards of Universities and Colleges (AGB) in June 2017. Additionally, she has published various articles in the areas of investment committee governance and investment management.

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



## RUTH KYLE\*

Business Development Associate  
Select Equity Group

Ms. Kyle joined Select Equity in April 2012. Prior to joining Select Equity, Ms. Kyle worked in Investor Relations at Atwater Capital, a spin-out of Atticus Capital. Prior to Atwater Capital, she worked at Atticus Capital. Ms. Kyle received a B.A. from Vanderbilt University (magna cum laude).



## JOHN LARSON\*

Managing Director, Head of Institutional Sales  
Syntax, LLC

John leads the Institutional business development and client service aspects of Syntax, an investment management and index provider firm that offers Syntax Stratified Indices. The Stratified-Weight methodology manages the inadvertent overweighting of related business risks that occurs in capitalization-weighted and equal-weighted indices.

John brings over 20 years of experience developing and servicing institutional relationships in North America and abroad. His expertise with many of the world's well-known institutions and consultants serves Syntax clients and represent Syntax Indices.

Prior to joining Syntax, John held Senior Institutional leadership positions with asset management firms in the greater New York and Philadelphia area including Gardner Lewis, Cooke & Bieler, and began his investment management career with Penn Capital Management in 1995. John received a B.A. from the University of Virginia as well as completed course work at The University of California Berkeley. John serves as Chairman of the Investment Committee and Trustee for the Delaware Museum of Natural History and remains active with the Association of Investment Management Sales Executives (AIMSE) having previously served as a Board Member and Regional Director.



## 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.



## DR. DESMOND LUN

Founder & Chief Investment Officer  
Taaffeite Capital Management

Dr. Desmond Lun is the Founder and CIO of Taaffeite Capital Management, a quantitative managed futures firm based in suburban Philadelphia, PA. Taaffeite manages the TCM Liquid Alpha Program, a trading strategy based on an artificial intelligence system developed as a result of Dr. Lun's extensive academic research in computational biology.

Dr. Lun is one of the leading global authorities in mathematical models that predict the behavior of biological systems. Prior to joining Rutgers University in 2010, where he is now a Professor in the Departments of Computer Science and Plant Biology, he was an Associate Professor in the School of Mathematics and Statistics and Director of the Phenomics and Bioinformatics Research Centre at the University of South Australia. From 2006 to 2008, he was a Computational Biologist at the Broad Institute of MIT and Harvard and a Research Fellow in Genetics at Harvard Medical School.

Dr. Lun received his Ph.D. in electrical engineering and computer science from the Massachusetts Institute of Technology (MIT) in 2006. Dr. Lun's scientific accomplishments includes several U.S. patents and co-authoring the book *Network Coding* (published in 2008) and over 30 academic papers, which have collectively received over 4,000 academic citations.



## BART MARCHANT\*

Institutional Regional Director, Southeast  
WisdomTree Asset Management

Bart joined WisdomTree Asset Management in October 2013 and is responsible client service efforts in the Pension, Foundation, Endowment and Sub-Advisory markets for the Southeast United States. Prior to joining WisdomTree, Bart was an analyst at Goldman Sachs Asset Management focusing on business development and client relations in the Fundamental Equity business. He received his B.A. in International Business from Dickinson College. He is on the Young Executive Board of iMentor, a New York based charity serving under-privileged youth, and on the Institutional Committee for NYSSA, the New York Society of Security Analysts.



## KRISTINA MATWIJEC

Investment Officer, Alternatives  
Consolidated Edison Company of NY, Inc.

Ms. Matwijec is currently an Investment Officer for Con Edison's Pension Plan. In her current role, she has responsibility for the alternative investments. Before taking over the alternatives, Kris covered public equity and fixed income. In addition to her investment oversight duties, Kris handles the administrative aspects of the Plan. Prior to her position in Pension Management, Kris spent two years with Con Edison's Corporate Finance group, working on debt and equity issuances. Before joining Con Edison in 2005, Kris worked in the Sales, Service, and Marketing group at General Motors. Kris has an MBA from New York University and a B.A. from the University of South Carolina.



## JAMIE McLAUGHLIN

Founder & Chief Executive Officer  
J.H. McLaughlin & Co., LLC

In 2010, Mr. McLaughlin founded J. H. McLaughlin & Co., LLC, a management consulting firm focusing on strategy and practice management for wealth management and investment advisory firms, private banks, trust companies, single and multi-family offices.

He has over 25 years of experience in both senior operating roles and client-facing roles in the family office and ultra-high net worth industry. Previously, he was CEO of Geller Family Office Services, a partner at Convergent Wealth Advisors where he built the firm's New York office, the regional president of Mellon Private Wealth Management's New York region, and a financial advisor at Sanford C. Bernstein & Co., Inc., where he started in the wealth management industry.

Earlier in his career, Mr. McLaughlin served in the Connecticut General Assembly for a decade as a two-term State Representative and a three-term State Senator.

He is Vice Chairman of the Board of Trustees of the American Foundation for the Blind (AFB) [www.afb.org](http://www.afb.org) where for many years he chaired the AFB's investment committee. He is Chair of the Subscribers Advisory Committee for PURE [www.pureinsurance.com](http://www.pureinsurance.com), a policyholder-owned property and casualty insurance company and a member of the Greenwich Roundtable ([www.greenwichroundtable.org](http://www.greenwichroundtable.org)). He serves on the Advisory Committee of Addepar, Inc. ([www.addepar.com](http://www.addepar.com)), a wealth management technology company and on the Advisory Board of PivotalPath ([www.pivotalpath.com](http://www.pivotalpath.com)), a hedge fund due diligence firm. He also serves on the Town of Darien's Board of Finance.

Mr. McLaughlin received his Bachelor's degree in History from Lafayette College and his Master's in Public Administration from Harvard's Kennedy School.



### SAFIA B. MEHTA, CFA

Senior Vice President, Portfolio Manager  
Progress Investment Management Company, LLC

At Progress, Safia manages over \$ 2.5 billion assets in US and International equity portfolios. She manages client portfolios, including asset allocation and execution of investment strategy by constructing manager of manager portfolio structures. Through consultative client engagement, Safia also develops unique investment solutions to meet their asset allocation needs. She is also a member of the firm's investment and portfolio management committees.

Safia has over 22 years of investment management experience. A few highlights includes her tenure at Alliance Bernstein, where she led the development of multi-asset investment solutions for Asian and European investors, at Prudential Retirement she was responsible for the investment of over \$40 billion across asset classes for institutional defined benefit and defined contribution pension funds and at PepsiCo she managed pension assets of over \$5 billion across asset classes.

Safia graduated with a Bachelor of Arts from the University of Toronto, Canada and holds the Chartered Financial Analyst (CFA) designation. She is a member of the CFA Institute's Asset Manager Code Advisory Committee, and a member the CFA Society of Stamford and National Association of Securities Professionals (NASP). She regularly speaks at various industry conferences on current investment topics.



### RACHEL S. L. MINARD\*

Founder & Chief Executive Officer  
Minard Capital LLC

Rachel S.L. Minard is the Founder and Chief Executive Officer of Minard Capital, a leading independent, global asset raising consulting firm headquartered in San Francisco, California. The firm is dedicated to offering strategic, asset raising consulting services to alternative investment management firms around the world. Minard Capital is not a broker/dealer nor third-party marketer.

Before building Minard Capital, Rachel built and managed global institutional investment businesses for 25 years, including 19 years building fund of hedge fund firms, notably Cadogan Management

and Corbin Capital Partners. Having raised over \$14 billion in her career, Rachel started her marketing career in 1991 after her first company was hired to build the Ronald Reagan Presidential Library.

Rachel, widely regarded as a leader in the hedge fund industry, has won numerous industry awards for institutional marketing and serves on several-high profile advisory boards. She has been featured on CNBC, TEDx and NPR and speaks alongside the world's preeminent sophisticated investors on all facets of investing as well as the tips and techniques of capital raising. She also serves on the Investment Sub-Committee of the Westover School Endowment.

Rachel received her undergraduate degree in Journalism with honors from Northeastern University with notable distinction as a Wesley W. Marple Distinguished Lecturer by the university.



## MATTHEW MORDUS, CAIA

Director, Alternatives  
XL Group Investments LLC

Matthew Mordus serves as Chairman of the Hedge Fund Investment Committee within the Investments Group at XL Catlin. XL Catlin is a global P&C insurance and reinsurance company. The firm manages a \$35 billion investment portfolio, of which approximately \$1.5 billion is invested in hedge funds. Mr. Mordus is primarily responsible for the firm's Hedge Fund Portfolio, though he also serves on the firm's House View Committee as well as the firm's Private Credit Team. Prior to joining XL Catlin in 2002, he worked as an Analyst in the Investment Banking Division at Morgan Stanley, where he focused on M&A and other capital markets transactions within the Financial Institutions Group.

Mr. Mordus earned a B.A. (Magna Cum Laude) from Colgate University.



## JULIE MOORE

Founding Partner & Head of Global Equity Research  
Rocaton

Julie Moore, Head of Global Equity Research, is a Founding Partner of Rocaton and leads the research effort for global equity, non-U.S. developed markets, and emerging markets. Julie joined Rocaton in 2002 after 5 years at Barra Rogers Casey where she served as Director and Head of International Equity Research and was previously part of a client relationship and consulting team. Julie has also served as a Portfolio Manager with Bankers Trust Company. Julie earned an M.B.A. at Amos Tuck School of Business at Dartmouth College and a B.S. in Business Administration at Skidmore College.



## DAVID MORRELL

Director of University Benefits  
State University of New York

David Morrell is the Director of University Benefits in the Central Administration office for the 64 diverse campuses of the State University of New York (SUNY), which is the largest comprehensive system of public higher education in the United States. At SUNY, Dave administers the Optional Retirement Program

(ORP) as the largest public defined contribution retirement plan in the U.S., with over 85,000 participants and approximately \$18.5 billion in assets. Dave also manages the NYS Voluntary Defined Contribution (VDC) Plan, which was established by the 2012 New York State Pension Reform in April 2012, and has over 500 members and nearly \$22 million in assets.

In addition to his service at SUNY Central Administration, Dave is a professor of Human Resources, Employment Law, and International Cross-Cultural Management at Empire State College. He previously worked as a human resources administrator for Empire State College and for the Research Foundation of SUNY. He is an active member of numerous committees related to human resources, and has contributed as a member of the New York State negotiating teams for the contractual agreements between the State and state employee unions.



## DONALD MOTSCHWILLER

Chief Executive Officer  
FNY Capital Management LP

Donald Motschwiler is the Chief Executive Officer of FNY Capital Management LP and Principle at Discovery Capital Management. At First New York Donald leads the firm's growth and diversification strategy. Currently the firm's multi-billion dollar portfolio is managed by 150+ portfolio managers, traders, hedge funds and CTA's. The firm's balance sheet consists exclusively of partners' capital. The low volatility high Sharpe low net exposure strategies are expressed across global exchange listed assets classes including equities, derivatives, commodities, credit, futures, rates and foreign exchange.

Donald is a graduate of Cornell University and possess decades of experience as an owner/operator in the asset allocation business.



## TIMOTHY NG

Chief Investment Officer  
Clearbrook

Tim joined the firm in 2010 and is Chief Investment Officer at Clearbrook, as well as Head of the Clearbrook Investment Committee. Within this role, Tim is involved in global macro and manager research, portfolio analysis and risk management. Prior to Clearbrook, Tim was President and Chief Investment Officer of Structured Investments Group, LLC. Tim began his career in 1982 and has served as an alternative investment and hedge fund advisor in numerous capacities. Previously, Tim was a Managing Partner with Access International Advisors and has held the title of Senior Vice President in varying roles at Prudential Securities, Smith Barney, and Oppenheimer & Company. During his career, he was one of the first advisors to place investor capital into hedge funds, portable alpha portfolios, structured/hedge fund linked notes, and insurance dedicated hedge fund products. Tim has had oversight of more than \$5 billion of investor capital on behalf of corporations, pension funds, endowments and foundations, banks, investment advisory firms, and family offices. Tim is a Board member of Clearbrook Global Advisors and the Florida Alternative Investment Association. He has been a holder of securities licenses Series 3, 7, 24, 63 and 65. Tim received a BA in Economics from Stony Brook University and an MBA with honors from Long Island University. Tim has 33 years of investment experience.



## ROY NIEDERHOFFER

President

R.G. Niederhoffer Capital Management, Inc.

Roy Niederhoffer graduated magna cum laude from Harvard in 1987 with a degree in Computational Neuroscience. After working for another hedge fund for 5 years, he founded R. G. Niederhoffer Capital Management, Inc. (“RGNCM”), in 1993. Since then, RGNCM has employed a quantitative, behavioral finance-based strategy to trade equities, fixed income, foreign exchange and commodities to provide returns that are both valuable on a stand-alone basis and also provide significant downside protection to clients’ portfolios. Roy leads the Management Committee and brings nearly 30 years of experience in the hedge fund industry.

Mr. Niederhoffer also serves as Chairman of the Board for the New York City Opera and the Harmony Program. He is an accomplished classical and jazz pianist, plays violin with the Park Avenue Chamber Symphony, and is an avid skier. He, his wife and his five children reside in New York City.



## MARTIN SØNDERSKOV NIELSEN

President

Kirstein US LLC

Martin Sønderskov Nielsen has been with Kirstein A/S since the beginning of 2007. Since April 2015, Martin has been the President of Kirstein’s subsidiary in Boston, USA, and he is involved in both the services for our institutional clients in Investments and our consultancy services for international asset managers.

Martin Nielsen holds a M.Sc. in Finance and Strategic Management, and he has a Bachelor’s degree in Business Administration and Economic from Copenhagen Business School.



## KWEKU OBED, CFA, CAIA

Managing Partner

Marquette Associates, Inc.

Kweku Obed is a managing partner for Marquette Associates. An owner of the firm, Kweku has been with the company since 2014 and has 19 years of investment experience.

Kweku joined the firm from Mercer Investment Consulting, where he served as a principal and senior investment consultant in their Chicago office. His responsibilities included working with defined benefit and defined contribution clients on asset allocation, performance measurement and analysis, investment manager search, and investment policy development. Prior to Mercer, Kweku worked at Merrill Lynch Investment Managers (now part of BlackRock) as an assistant vice president in their tax-exempt fixed income research group.

Kweku holds a B.S. with honors in economics from Queen Mary College, University of London, and a M.S. in development economics from SOAS, University of London. He is a recipient of the Bernard Corry Prize in Economics. Kweku is a CFA charterholder, holds the Chartered Alternative Investment Analyst designation and contributed to the official CAIA textbook, *CAIA Level I: An*

*Introduction to Core Topics in Alternative Investments*, Second Edition. He is a member of the board of trustees for the La Rabida Children's Hospital, a member of the Economic Club of Chicago and sits on the investment committee for the Plan Sponsor Council of America (PSCA).



## DAVID OURLICHT

Managing Director & Special Advisor to the Chairman  
GAMCO Asset Management

Mr. Ourlicht is Managing Director and Special Advisor to the Chairman of GAMCO a \$40 billion asset under management asset management firm offering a combination of value equity and investment partnership strategies to address investment solution for the institutional marketplace. He spent many years as a public finance investment banker concentrating revenue bond financing for transportation and infrastructure projects. Mr. Ourlicht then transitioned to the Taxable Capital Markets arena leading the Debt and Equity Capital Markets Group at a leading boutique investment banking firm before his more recent experience in the Asset Management industry.

Mr. Ourlicht is a Commissioner of the New York State Insurance Fund (NYSIF), Chairman of the Investment Committee and Member of the Budget and Audit Committee. NYSIF is over 100 year old State Agency which provides approximately 32% of Workers Compensation insurance policies in New York State. The Fund has almost \$17 billion dollars that it is investing on behalf of policy holders and the Fund. As his role as Chairman of the Investment Committee he oversees Fund policy regarding; asset allocation, performance guidelines as well as leading the Commissioners efforts in manager review and selection and issues regarding Custodial and Consulting services.

Mr. Ourlicht is a trustee of the State of New York Construction Fund; the Construction Fund and Chair of the Audit Committee the Fund is responsible for design, building and maintenance of all the construction projects occurring on the 40 SUNY Campuses.

Mr. Ourlicht was the Trustee designated by New York City Public Advocate to the New York City Employees retirement System (NYCERS) the largest municipal public employee retirement system in the US with over \$51 billion in assets representing 350,000 active members and retirees responsible for investing the Plans assets across all asset classes including; Private Equity, Real Estate, Infrastructure and Opportunistic Credit.

He was honored as a NASP Foundation Hall of Fame member in 2013, the American Diabetes Association 2014 Father of the Year and 2014 Trustee of the year by NASP-NY. He is a frequent speaker on alternative investments at industry conferences.

Mr. Ourlicht is on the Advisory Board of the Alternative Investment Forum and a Founding Board member of the New York Association of Public Employees' Retirement Systems representing over \$660 million in assets. He sits on the Advisory Council for Mobilizing Institutional Investments for Developing Africa's Infrastructure (MIDA). He is also on the Board of CG Blockchain a company that utilizes blockchain technology in the Hedge Fund Industry.

Mr. Ourlicht graduated with as B.S. Degree from the State University of New York College at Buffalo. His volunteer affiliations include the Sponsors for Educational Opportunities. He resides in Manhattan with his wife.

He holds FINRA licenses series 7 and 63.



## CHRIS PAOLELLA\*

Managing Partner  
Liquid Strategies, LLC

Chris Paolella has over 29 years of investment industry experience, is a founding partner of Liquid Strategies and is a member of the firm's management committee. Chris is actively involved with Liquid Strategies' firm-wide strategy, operations, marketing and investor relations. Most recently, he served as Principal, Managing Director for the Concourse Capital Partners, L.P., a global long/short equity fund that he co-founded in 2008. Chris also co-founded affiliated, institutional investment management firm Perimeter Capital Management in 2006. At Perimeter, Chris was one of the firm's Managing Partners and was actively involved in all aspects of the firm's day-to-day operations. Prior to 2006, he served in senior positions with both Trusco Capital Management and Great-West Life & Annuity. Chris is a graduate of the University of Richmond, where he received a B.A. in Economics.



## ANDREW PARRILLO

Founder  
Newport Capital Advisers

Andrew D. Parrillo founded Newport Capital Advisers LLC in 1995 as a registered investment adviser to provide discretionary and consultative investment services with focused accountability. The firm's primary activity is research of all asset categories and investment managers that are utilized to implement tailored investment strategies for clients. Hedge funds have been a significant allocation in client portfolios since 1995. Although the firm has engaged strategies from firms of all sizes, it has been especially interested in engaging firms in their early stages and those particularly mindful of the risks of asset and personnel growth. Mr. Parrillo regularly speaks about investment manager selection at various national investment conferences. Early in his investment career he managed the Trust Investment Division's Retirement Investment Department and was a member of the investment policy committee at Fleet National Bank. Before founding Newport Capital Advisers, he was a senior vice president of Wellesley Group, Inc., where he advised endowment funds and family offices on asset allocation and investment manager selection. He is a graduate of Boston University and served as a U.S. Air Force Captain and Senior Navigator.



## CAROLYN PATTON, CFA\*

Head of Distribution Americas  
First State Investments

Carolyn Patton, CFA, has 25 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 \$158.1B as of March 31, 2017. The firm's expertise spans a range of asset classes comprising direct and listed infrastructure in real assets, fixed income, Asia Pacific and emerging markets equities, and multi-asset strategies. 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 in 2017, 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 previously, 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 University of Virginia and is a CFA Charterholder.



### GEORGE PERCHES

Senior Vice President, Independent Adviser Group  
Callan Associates Inc.

George Perches is a Senior Vice President in Callan's Independent Adviser Group. He works with financial intermediaries and middle market consulting firms on client service and business development.

Prior to joining Callan in 2014, George held a variety of positions in wealth management and consulting. He began his career in institutional consulting with Wilshire Associates and SEI Capital Resources. He went on to build a managed account and consulting service for the Private Client Department of Montgomery Securities and later served as a Private Wealth Advisor with the Merrill Lynch Private Banking and Investment Group. More recently, George has consulted to individual investors on the evaluation and selection of wealth managers and has helped establish the investment operations of a start-up Registered Investment Adviser.

George graduated from San Diego State University with a degree in Business Administration - Finance.



### MICHAEL PERDZOCK

Research Director of Traditional Investments & Senior Consultant  
Gavion LLC

Mike Perdzock serves as the Director of Research of Traditional Investments as well as a Senior Consultant to several of the firm's largest client relationships. He is responsible for due diligence related to existing client traditional investment managers including the identification of new managers and investment strategies. Mike is also a key member of the firm's Research Advisory Board. In 1990, Mike entered the institutional consulting field as a financial analyst and served as a senior supervising analyst and director of manager research. Prior to his tenure in the investment consulting industry, Mike was employed by First Tennessee Investment Management as an equity trader, investment analyst, and portfolio manager. Mike holds a bachelor's degree in finance from Arkansas State University.

\*Equity Owner



## LARRY POKORA\*

Global Director of Investor Relations  
LibreMax Capital, LLC

Mr. Pokora is the Head of Global Investor Relations and Marketing at LibreMax and is responsible for the team dedicated to growing and retaining the firm's assets. Prior to joining LibreMax in September 2013, Larry held positions as Vice President and Institutional Sales Director for Baron Capital. He also served as a Senior Vice President of Investor Relations at Paulson & Company where he focused on global relationships with institutional plan sponsors, OCIO providers and consultants. Additional positions include Senior Vice President at Chartwell Investment Partners, Global Head of Sales and Marketing at Brandywine Asset Management, and a Managing Director at SEI Investments. Mr. Pokora started his career Mellon Financial Services in 1987 working with the bank's institutional clients.

In 2017, Larry was awarded AIMSE's Richard A. Lothrop Outstanding Achievement Award for his efforts and activities in the investment management industry and his community. Larry is very proud that he served on the AIMSE board for 7 years as well as President of AIMSE in 2008 – 2009. He received his Associate's Degree in Computer Science from Community College of Allegheny County in 1982.

Away from the industry, Larry enjoys spending time with his wife Virginia and children Chris and Katie. He also finds time for a little golf here and there.



## SHERRY PRYOR WITTER

Managing Partner, Co-Founder & Chief Investment Officer  
Witter Family Offices

Sherry Pryor Witter is the Managing Partner, Co-Founder and Chief Investment Officer of the Witter (Dean Witter) Family Offices, headquartered in New York. She is responsible for overseeing all aspects of the investing and operating activities. Sherry has managed assets for over two decades and has a strong commitment to developing and incubating new and unexploited trading strategies. As a Family Office, the Witter assets are invested in real estate, private equity, venture, art, fine musical instruments, and hedge funds. The monies across these asset classes have contributed to wealth expansion and the hedge fund investments have generated a large portion of the performance. In an effort to build out the Witter hedge fund platform, Sherry has and continues to be the early partner, sometimes the seeder of small and emerging hedge fund managers. Sherry will continue to add to the stable of traders which includes a diversified set of liquid strategies that encompasses event driven, equity long/short, directional, commodities, and others. Initial allocations of capital start small and increase gradually as the newer strategies achieve their performance targets. On the private side, Sherry continues to be the lead investor and co-investor direct to companies and in funds. Prior to forming the Witter Family offices with her husband Michael Witter in 2003, Sherry started her first hedge fund when she was 23, where she created a quantitative/qualitative research platform to provide superior returns and performance. Profitable gains have been generated since inception by Sherry implementing various investment strategies, managing long/short portfolios with a strong

focus on liquidity and non-market correlated returns. Sherry began her career at Lazard Frères followed by ESL Investments, Sherry is an alumnus of the University of Pennsylvania, the Wharton Undergraduate School and The Juilliard School, Pre-College Division. She was born in New York City and continues to reside in New York with her husband and sons.



### DAVID READERMAN, CFA

Managing Member  
Endurance Capital Partners

David Readerman, CFA, is the managing member of Endurance Capital Partners and the portfolio manager of Endurance Capital Fund. Mr. Readerman has over 30 years of technology investing experience, having served as Senior VP of Research at Marsico Capital Management, Founding Partner and Equity Growth Strategist at Thomas Weisel Partners and Lead Equity Research Analyst in the software and internet sector at Montgomery Securities. David holds a BA in Economics from Colgate University and an MBA in Finance from New York University. Outside of the office, Mr. Readerman is a competitive cyclist and a former long-distance marathon/half marathon/10k runner.



### RHODA SHAPIRO

Principal & Senior Manager Research Consultant  
Mercer

Rhoda is a Principal and Senior Manager Research Consultant within Mercer's Equity Boutique, a unit within Mercer's investment consulting business. Based in Norwalk, Connecticut, she is responsible for researching global and non-U.S. equity managers and strategies. Rhoda works with a broad range of clients and advises them on the monitoring and selection of investment managers.

Rhoda joined Mercer in July 2011 through the acquisition of Evaluation Associates. At Evaluation Associates, she was the Director of Global Equity Research and responsible for global equity market coverage, asset class research, and evaluation and recommendation of global equity managers. In addition, she directed all equity client searches. Prior to joining Evaluation Associates, Rhoda was a consultant at Efron Enterprises. She has also served as an assistant vice president at InterSec Research Corporation, working on international investment managers and issues, and as an investment analyst at PepsiCo, managing the investment process of the PepsiCo pension fund. Prior to that, Rhoda was a financial analyst at Citibank, N.A. and an assistant economist at the Federal Reserve Bank of New York.

Mrs. Shapiro has a BA, Economics, cum laude, minor in Mathematics, from Barnard College and an MBA, Finance, from New York University Stern School of Business.



## RANDY SLIFKA

Managing Principal  
Slifka Asset Management

Mr. Slifka is the Managing Principal of Slifka Asset Management, a family office, which manages assets for his family and other high net worth families. Randy Slifka specializes in asset allocation, portfolio construction and hedge fund manager analysis. Mr. Slifka is the Chief Investment Officer of Slifka Asset Management and has been investing in hedge funds since 1983.

Mr. Slifka started his career at E.M. Warburg Pincus & Co., where for five years he made principal investments, conducted due diligence, and sourced investment opportunities. He was Senior Portfolio Manager and Principal at The Halcyon Partnerships from 1989 to 1997. At Halcyon, he was primarily responsible for the firm's distressed debt and special situations effort, and created and managed an event-driven multi-manager fund.

Slifka Asset Management's activities include: Static Asset Allocation, Dynamic Asset Allocation, Hedge Fund Portfolio Construction, Hedge Fund Manager Analysis, Risk Management (Portfolio Level-Manager Level), Hedge Fund Manager Monitoring, Full Service Internet Based Reporting, and Tax Advantaged - Fund of Hedge Fund Structures.

Mr. Slifka also has extensive knowledge and experience with respect to geopolitics and their impact on the capital markets. He is a trustee of the Washington Institute and Saban Center for Middle East Policy at the Brookings Institution.

Randy Slifka is also a passionate collector of modern and contemporary art who has been collecting art for two decades. He comes from a family that has supported the arts and museums in New York for three generations. Mr. Slifka is on the acquisition committees of several museums, and is extensively involved with many art organizations, including The Whitney Museum, The Museum of Modern Art, The Guggenheim, The New Museum, The Israel Museum, White Columns and the Tate Modern.

Mr. Slifka graduated from Brandeis University, Phi Beta Kappa, Summa Cum Laude. He has spoken at many industry conferences, and his comments have appeared in *Business Week*, *Forbes*, *The New York Times*, *The Wall Street Journal* and *Fortune Magazine*.

Randy Slifka is married to Janice Slifka and has 2 sons, 17 year old Joshua, and 1 year old Alexander. They reside in NYC and East Hampton, NY.



## JASON SMALL, CFA

Partner  
FiduciaryVest

Jason Small, CFA, Partner at FiduciaryVest, is a consultant and team member in the service of trustee directed investment programs. His industry experience positions him as a lead on institutional investment pools for hospitals, endowments, and pensions, serving as a fiduciary alongside the trustees. Jason opened our Philadelphia office to serve a growing client base.

Prior to joining FiduciaryVest, Jason served on the large cap equity team at Chartwell Investment Partners. While there, he consulted on security selection, as well as marketing and client service strategies. An effective public speaker, Jason spoke before investment conferences nationally and on television news programs. In an earlier career iteration, Jason worked as a mechanical engineer with the surgical division of Medtronic and holds a design patent.

Jason graduated from Vanderbilt University with a degree in mechanical engineering. He then went on to earn his MBA from the University of North Carolina Kenan-Flagler Business School, where he was also awarded the North Carolina Treasury Management Fellowship. Currently, Jason holds a chartered financial analyst (CFA) designation and is a member of the CFA Society of Philadelphia.



### COLGATE SMITH\*

Director, Institutional Business Development  
VanEck Securities Corporation

Mr. Smith joined Van Eck in 2013. He serves as Director of Institutional Business Development with specific responsibility for the U.S. investment consultant and OCIO channel.

Prior to joining Van Eck, Mr. Smith was an associate on the Equity Capital Markets desk at Barclays Capital/Lehman Brothers, where he was responsible for equity origination for investment banking clients. His earlier career experience includes a junior role in the Private Wealth Management Division at Lehman Brothers.

Mr. Smith received an MBA in Finance and Entrepreneurship & Innovation from the Kellogg School of Management at Northwestern University. He received a BA in History from Trinity College.



### CHRISTOPHER SOLARZ, CFA, CPA, CAIA

Managing Director  
Cliffwater LLC

Chris is a Managing Director of Cliffwater LLC in our New York office and a member of the hedge fund research team. Prior to joining Cliffwater in 2011, Chris was a Senior Analyst at SAIL Advisors, where he focused on manager selection and due diligence as Head of Research for tactical trading and relative value strategies. Previous experience includes working for ING Investment Management, Antarctica Asset Management, Societe Generale Barr Devlin, and CIBC World Markets.

He earned a BA in Economics and Anthropology from the University of Pennsylvania and a MComm in Finance from the University of New South Wales, where he was a Federation Scholar. Chris is a Certified Public Accountant, holds the Chartered Alternative Investment Analyst® designation, the Chartered Financial Analyst® designation, and is a member of the New York Society of Security Analysts. Chris has broken 6 Guinness World Records, has run marathons on all 7 continents and in all 50 US states.



## JEFFREY SUTTON, CFA

Managing Director, Consulting Group  
Oppenheimer Asset Management

Mr. Sutton has been in the investment business since October 1995. Prior to joining the firm in April 2009, he was at UBS Global Asset Management as Director of Manager Research-Global Investment Solutions. Prior to UBS, Jeff had worked at Northern Trust, Forstman-Leff Associates, UBS Paine Webber, and at Salomon Smith Barney. He is a graduate of Indiana University and has an MBA in finance from Kellstadt Graduate School of Business at DePaul University. He holds the Chartered Financial Analyst designation from the CFA Institute and is a member of the New York Society of Security Analysts.



## DANIEL TARLAS, CFA

Senior Managing Director  
Asset Consulting Group, Inc.

Dan Tarlas is Senior Managing Director of Asset Consulting Group (ACG); an investment consulting firm that provides comprehensive investment consulting services to a nationwide client base. ACG's services include investment policy development, asset allocation analysis, portfolio design and implementation, investment manager search and selection, risk management, ongoing portfolio oversight, and investment performance reporting. As a principal of the firm, Dan directs firm-wide initiatives, including setting the firm's vision and direction. Dan oversees ACG's private client advisory practice, which includes family offices and ultra-high net-worth investors. He also serves on ACG's Investment Committee, whose primary charge is to establish the firm's investment philosophy and approach and ensure continuity and consistency in the investment recommendations made to clients. He has been with ACG for 25 years and has 34 years of investment industry experience. Dan is a holder of the Chartered Financial Analyst designation and is a member of the CFA Society of St. Louis. He serves as a mentor for the ReEngage program at FOCUS North America and sits on the Executive Board of Our Little Haven, a not-for-profit committed to providing early intervention services for children and families.



## TIMOTHY TAYLOR

Senior Investment Officer, Global Equity  
Florida State Board of Administration

Tim is currently Senior Investment Officer (SIO), Global Equity at the Florida State Board of Administration (SBA). The SBA primarily oversees the investments of the \$150 billion Florida Retirement System Trust Fund. He, along with Global Equity's other SIO, is responsible for all matters related to the asset class including personnel, investment structure, and oversight of internal and external portfolio management.

Tim graduated from Florida State University (FSU) with a Bachelor of Science in Finance. He began his career in the banking industry in Tampa. Tim relocated to Tallahassee after accepting an opportunity with Florida's 457 Deferred Compensation Program. He helped create materials so

that employees could compare investment providers and products, and made educational presentations throughout the state. While working in Deferred Compensation, Tim began his post-graduate work at FSU, ultimately graduating with a Master of Business Administration (MBA) degree.

Tim joined the SBA as a Portfolio Manager in the International Equity Asset Class and was later promoted to Senior Portfolio Manager. He has been involved in the oversight of external investment managers, and has spearheaded multiple manager searches. Tim was responsible for coverage of Japan in support of an actively managed internal portfolio, for which he also served as head trader. He has evaluated opportunities in the China A-Share market, led transition manager searches and restructuring events, completed research on currency management, and produced equity and foreign currency transaction analysis. Tim was part of the team that implemented a restructuring of the investments of the Global Equity asset class, a \$12 billion transition over several months.

Tim was promoted to Deputy SIO in February 2015 and subsequently appointed to his current position on January 1, 2016.



### KURT TERRIEN\*

Director, Institutional Business  
Clarkston Capital Partners, LLC

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

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



### ERIC THIELSCHER, CFA

Managing Director  
Cambridge Associates

Eric is a Managing Director in the firm's Boston office. He is responsible for performing due diligence on ex-U.S. equity managers and advising the firm's investment consultants on new and existing funds.

Prior to joining Cambridge Associates in 2007, Eric spent eleven years at MFS Investment Management most recently as an Assistant Vice President in the Institutional Product Management department where he was a member of the global and international team. In this position, he helped quadruple assets and retain 90% of the existing client base during a three-year period. During his tenure at MFS he also held positions in Equity Trading, Private Portfolio Management, and Trade Operations. Before MFS, he worked in London for Credit Suisse Financial Products and began his career at The Boston Company.

Eric is the founder of Gloucester Charters Inc., a saltwater fishing guide company, and ran the Boston Marathon in 2001.



## CHRISTIAN THOMAS, CFA, CIPM

Senior Investment Consultant  
USI Consulting Group

Christian Thomas is an Investment Consultant with USI Advisors, Inc., a federally registered investment advisor and wholly owned subsidiary of USI Consulting Group. He is responsible for developing, implementing and monitoring investment strategies for defined benefit and defined contribution clients, and regularly conducts investment review meetings with clients.

Prior to joining USI Consulting Group, Christian worked in various roles throughout the financial services industry, gaining experience in credit analysis, 401k plan administration, and investment performance and attribution reporting. This breadth of experience has allowed Christian to develop a strong knowledge base in areas critical to both investment and plan design evaluation.

Christian earned a MBA in Finance from the University of Connecticut. Christian is also a CFA charter holder. In addition, Christian has earned the right to use the Certificate in Investment Performance Measurement (CIPM) designation.



## RONALD THOMPSON, CFA, CAIA

Manager, Pension Asset Management  
Rockwell Automation

Ronald Thompson joined Rockwell Automation in December 2013 as the Manager of Pension Asset Management. In this role, he oversees the management of Rockwell's \$3.0 billion in global defined benefit plan assets and \$2.6B in defined contribution assets. He is a member of Rockwell's US Investment Committee and serves as a Trustee for retirement plans in Canada, the UK and Switzerland.

Prior to joining Rockwell Automation, he spent five years as the Head of Global Pension Plans at Dow Corning Corporation in Midland, Michigan and over seven years in the Pension Investment Group at The Dow Chemical Company. While at Dow Corning, he was a member of the US Investment Committee, served as a Trustee for pension plans in the UK and Belgium and was the Treasurer of the Dow Corning Foundation. He was responsible for the management and oversight of approximately \$1.5 billion in global defined benefit plan assets and \$1B in defined contribution assets. During his seven years at The Dow Chemical Company, he was an equity analyst and portfolio manager for a \$750 million equity portfolio, and was on a committee that monitored Dow's external investment managers.

Thompson graduated from Michigan State University with a Bachelor's degree in Accounting and earned an MBA in Finance from the University of Wisconsin. He holds the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations and, early in his career, was a practicing CPA in Michigan and Wisconsin.

His currently is a member of the investment committee of the Children's Hospital of Wisconsin, and formerly served on the investment committees of Mid-Michigan Health Systems, the Chippewa Nature Center and Midland County Council on Aging.

He and his wife Courtney have one daughter.



## DEREK TUBBS\*

Vice President Institutional Development  
CornerCap Investment Counsel

Derek is an Associate Portfolio Manager and the Vice President of Institutional Development for CornerCap. He joined in 2013 with over 16 years of institutional investor experience and is a non-voting member of the investment committee.

His primary responsibility is to expand CornerCap's reach with institutional investors. Prior to joining CornerCap, Derek was a Senior Relationship Manager with a \$15 billion equity team at Wells Capital Management where he was the primary point of contact for the largest, most sophisticated and most complicated institutional clients. Derek started his investment career in 1996 and spent the next 12 years in institutional sales with both CIBC World Markets (formerly Oppenheimer) and Prudential Equity Group. He has an MBA from the Kelley School of Business at Indiana University and earned his BA with honors from Texas A&M University.



## VIKTOR ULA

Managing Principal  
PivotalPath

Mr. Ula is a managing principal at PivotalPath, responsible for the firm's strategic decisions, managing its resources and coordinating the team's research, business development and technology endeavors. Mr. Ula also serves as a member of the company's board of directors.

Mr. Ula has more than 15 years of experience within the investment alternatives space, including roles as chief executive officer and chief investment officer of Omega Asset Management Ltd., a London based asset manager with over \$600 million under management. Prior to joining the parent company, Omega Capital S.L. (Madrid) as head of hedge fund investments in January 2004, Mr. Ula was a Director at HVB Alternative Advisors in London and a vice president with LGT Capital Partners in Pfaeffikon, Switzerland. In each of those positions, he served as a member of the respective firm's investment committee.

Mr. Ula began his hedge fund investing career at The Invus Group in 1997. In addition to the time he has spent in financial services, Mr. Ula served as a political advisor to the Prime Minister of Kosovo during the Kosovo Status Talks, which subsequently led to Kosovo's declaration of independence on February 17, 2008.

Viktor is Series 65 licensed. He received a Bachelor of Science in Economics with Mathematical Emphasis from the University of Wisconsin-Madison and has a Master of Arts in International Relations from Yale University.



## LORI WALLACE

Research Director, Global Equity  
Pavilion Advisory Group Inc.

Ms. Wallace is a member of our Global Equity research team and has been with the firm since 2008. Previously, Ms. Wallace spent nine years at Sit Investment Associates in Minneapolis, where she focused on quantitative analysis and risk management. Ms. Wallace received her B.A. from Cornell College in Mount Vernon, IA where she majored in Mathematics and Business & Economics. She also has a M.B.A. from the University of Minnesota's Carlson School of Management.



## DR. PATRICK WELTON

Co-Founder, Chief Investment Officer & Chief Executive Officer  
Welton Investment Partners

Dr. Welton is Co-Founder of the firm and serves as the CEO and CIO. He has been an active investor for more than three decades, an investment manager since 1989, and actively contributes to the firm's ongoing research. Dr. Welton has served on committees for the Managed Funds Association (MFA) and as a prior member of the Board of Directors of the National Futures Association (NFA). He speaks at numerous conferences globally every year, participates in panel presentations, and has authored numerous articles about alternative investments, macroeconomic impacts on markets, and investment theory. Dr. Welton serves as Vice Chair of the Board of Montage Health and Chairs its pension and foundation investment committee. He serves as a Director of the Panetta Institute of Public Policy where he also serves on its investment committee. In the late 1990's, he Co-Founded Axios Data Analysis, one of the first large scale data analytics firms focused on health-care data. His former research experience includes molecular biological work in gene sequencing, biophysics with a focus on positron emission neurofunctional brain imaging, and oncology through clinical cancer trials during a nearly 20 year period as Clinical Professor at Stanford University Hospital. He holds undergraduate, doctoral and postdoctoral degrees from the University of Wisconsin, University of California, Los Angeles (UCLA), and Stanford University respectively.



## ANNOESJKA WEST

Senior Vice President & Plan Sponsor Consultant  
Callan Associates Inc.

Annoesjka T. West is a Senior Vice President in Callan's New Jersey Fund Sponsor Consulting office. She joined Callan in February 2001. Annoesjka works with a variety of fund sponsor clients, including corporate and public defined benefit plans, corporate defined contribution plans, and endowments and foundations. Her client responsibilities include strategic planning, plan implementation and coordination of special client projects. Annoesjka is a member of Callan's Manager Search and Defined Contribution Committees and a shareholder of the firm.

Prior to joining Callan, Annoesjka worked at New York Life Investment Management as a Senior Actuarial Services Representative in the Stable Value group.

Annoesjka earned an MBA in Finance from Rutgers University and graduated with honors and distinction from the Pennsylvania State University with a Bachelor of Science.



## WAYNE WICKER, CFA

Senior Vice President & Chief Investment Officer  
ICMA-RC

Wayne Wicker is the Senior Vice President and Chief Investment Officer. In this capacity, he oversees assets under management and administration that exceed \$52 billion as of June 30, 2017. He is responsible for the investment management, due diligence, and contract negotiations of the more than 30 investment funds ICMA-RC offers including the VT III Vantagepoint Funds, with assets over \$18 billion, and the VT PLUS Fund, with assets of \$10.6 billion as of June 30, 2017.

Mr. Wicker has more than 33 years of investment industry experience with equities, fixed income, and alternative investment portfolios. He has successfully managed institutional separate accounts and mutual fund products, and he has also built investment platforms through the use of external money managers. Additionally, he has had extensive client relations and client communications experience.

Before coming to ICMA-RC in September 2004, Mr. Wicker served as Chief Investment Officer with The Colony Group in Boston, MA. Previously, he was employed as Managing Director and Senior Portfolio Manager with Cadence Capital Management, an institutional money manager in Boston. As a partner with Cadence Capital, he managed a \$2.1 billion large cap growth equity fund and also served as a senior spokesperson for the firm, initiating and maintaining a number of key relationships across the consultant and plan sponsor communities.

Prior to that, Mr. Wicker served as the Director of Investment Strategy with the Howard Hughes Medical Institute in Bethesda, MD, where he was responsible for asset allocation and the development, implementation, and management of investment activities for the Institute's \$12 billion endowment. He also initiated and implemented complementary strategies within the domestic equity, foreign equity, fixed income, and alternative asset categories. Mr. Wicker has also been employed with Dayton Hudson Corporation and with IDS Financial Services, both in Minneapolis.

He has earned the Chartered Financial Analyst (CFA) designation and is a member of the CFA Society of Washington.

He holds two undergraduate degrees in Business Administration, Communications and Journalism as well as a Master's degree in Business Administration.



## MARK YUSKO

Chief Executive Officer & Chief Investment Officer  
Morgan Creek Capital Management

Mark Yusko is the Founder, CEO and Chief Investment Officer of Morgan Creek Capital Management. Prior to forming Morgan Creek, Mr. Yusko was President, Chief Investment Officer and Founder of UNC Management Company, the Endowment investment office for the University of North Carolina at Chapel Hill, from 1998 to 2004. Throughout his tenure, he directly oversaw strategic and tactical asset allocation recommendations to the Investment Fund Board, investment manager selection, manager performance evaluation, spending policy management and performance reporting. Total assets under management were \$1.5 billion (\$1.2 billion in endowment assets and \$300 million in working capital). Until 1998, Mr. Yusko was the Senior Investment Director for the University of Notre Dame Investment Office where he joined as the Assistant Investment Officer in October of 1993. He worked with the Chief Investment Officer in all aspects of Endowment Management. Mr. Yusko received his Bachelor of Science Degree, with Honors, in Biology and Chemistry from the University of Notre Dame and a Master of Business Administration in Accounting and Finance from the University of Chicago. Mr. Yusko is an Advisory Board member of a number of private capital partnerships and alternative investment programs and has served as a consultant on alternative investments to a select group of institutions. Mr. Yusko is an Investment Committee member of the MCNC Endowment, President and Chairman of the Investment Committee of The Hesburgh-Yusko Scholars Foundation at the University of Notre Dame, and President and Head of Investment Committee of the Morgan Creek Foundation.

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