



40TH ANNUAL MARKETING & SALES CONFERENCE

CONFERENCE PROGRAM

ENGAGE. GROW. SUCCEED.



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*Talk to us about how we can help you succeed.
Stop by our booth for a quick demo or catch us during a break.*

DEAR AIMSE MEMBERS:

Thank you for being part of the 40th AIMSE Annual Marketing & Sales Conference. We are thrilled and honored to have created an educational, impactful, and memorable program for you. We truly appreciate your attendance and look forward to seeing everyone interact, share ideas, learn, and have fun.

Our theme this year echoes AIMSE's mission to **ENGAGE, GROW, and SUCCEED**. From the key note speakers to the allocators to the social activities, we encourage you to take advantage of your peers' knowledge, experience, and backgrounds and help each other succeed. It ain't easy out there and we hope these few days will help you gain that extra edge.

The program contains an impressive line-up of industry leaders from their respective fields, with sessions diversified across channels, subject matters, and human behavior. A few highlights:

- ◆ Keynote speakers that include Dr. Gio Valiante, a performance psychologist who helps professional athletes and money managers to out-perform; Buddy Bush, an expert on collaborating across the generations; and Filippo Bartolotta, an Italian wine journalist who will demystify the drinking and ordering of wine so that we can all order with authority in front of our bosses
- ◆ Featured consultant presentations from the President of NEPC and the Head of Global Investment Research at Cambridge Associates
- ◆ Six breakout sessions that focus on specific channels and topical investment management trends
- ◆ The forever popular Consultant Roundtables that are well represented by both traditional and alternative consulting experts

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

Of course, it wouldn't be an AIMSE conference if we didn't include fun events to help foster new relationships and strengthen existing ones. In addition to our traditional golf, tennis, and volleyball tournaments, we have a few special surprises to celebrate 40 years of engaging, growing, and succeeding together!

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

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

Sincerely,

Miriam Tai & Mark Robertson
Conference Co-Chairs

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

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PRESIDENT

Managing Director
Elevation Marketing Advisory LLC
15 Pasture Lane
Darien, CT 06820
Work: (646) 468-1841
chris.rae@elevationsecurities.com

MS. CAROLYN PATTON, CFA [6/1/11-5/31/17]

VICE PRESIDENT

Managing Director, Global Client Group
Deutsche Asset Management
345 Park Avenue, 25th Fl.
New York, NY 10154
Cell: (610) 635-8869
carolyn.piskun@gmail.com

MR. CHRISTOPHER PAOLELLA [6/1/13-5/31/19]

TREASURER

Managing Partner
Liquid Strategies, LLC
6 Concourse Parkway, Ste 3300
Atlanta, GA 30328
Work: (770) 350-8709
cpaolella@lsfunds.com

MR. P. MACKENZIE HURD, CFA [6/1/12-5/31/17]

EMERITUS PRESIDENT

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

MS. ALEJANDRA ARGÜELLO [6/1/13-5/31/19]

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

MS. HEATHER CONFORTO BEATTY [6/1/14-6/1/17]

Vice President

First Eagle Investment Management, LLC
1345 Avenue of the Americas
New York, NY 10105-4300
Work: (212) 698-3170
Cell: (310) 699-5747
heather.beatty@feim.com

MR. GUS L. CATSAVIS, CFA [6/1/16-5/31/19]

Managing Director

Pinacle Asset Management, L.P.
8000 Maryland Ave, Ste 1080
Saint Louis, MO 63105
Work: (646) 717-8020
gcasavis@pinnacle-lp.com

MR. MATTHEW J. CROWE [6/1/11-5/31/17]

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

MR. BRIAN CROWELL, CFA [6/1/12-5/31/18]

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

MR. JACK C. EBENREITER, CFA [6/1/15-5/31/18]

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

MR. PAUL D. FOSTER, CFA [6/1/11-5/31/17]

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



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

MR. TIMOTHY P. HILL [6/1/13-5/31/19]
Icon Global Strategies
Cell: (917) 428-2977
Timhill92@yahoo.com

MR. KEVIN JOY [6/1/16-5/31/19]
Director
Weitz Investment Management
1125 South 103rd St.
Omaha, NE
Work: (312) 961-6526
Kjoy@weitzinvestments.com

MR. JOHN S. LARSON [6/1/16-5/31/19]
Managing Director, Head of Institutional Sales
Syntax, LLC
179 Franklin Street, 3rd Fl.
New York, NY 10013
Cell: (610) 357-4467
johnstuartlarson@gmail.com

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

MR. MARK ROBERTSON [6/1/12-5/31/18]
Director of Business Development
Proprietary Capital, LLC
1800 Larimer Street, Suite 1825
Denver, CO 80202
Work: (303) 951-2515
mrobertson@prop-cap.com

MS. CHRISTINE SASSE, CFA [6/1/14-5/31/17]
Managing Director, Consultant Relations
AB
1345 Avenue of the Americas
New York, NY 10105
Work: (212) 969-6664
christine.sasse@abglobal.com

MS. MIRIAM TAI, CFA, CAIA [6/1/15-5/31/18]
Cell: (415) 307-2283
miriamtai@gmail.com

MR. KURT TERRIEN [6/1/14-5/31/17]
Director of Institutional Business
Clarkston Capital Partners
91 West Long Lake Rd
Bloomfield Hills, MI 48304
Work: (248) 723-8000
kpt@clarkstoncapital.com

MS. HOLLY K. VERDEYEN [6/1/12-5/31/18]
Director, Defined Contribution Investments
Russell Investments
30 S. Wacker Drive, Ste 2200
Chicago, IL 60606
Work: (312) 780-7100
hverdeyen@russellinvestments.com

MR. GREGORY WEISSMAN [6/1/12-5/31/18]
Director, Consultant Relations
Putnam Investments
One Post Office Sq
Boston, MA 02109
Work: (617) 760-3222
gregory_weissman@putnam.com

MS. KIMBERLEY A. WOOLVERTON, CFA
[6/1/11-5/31/17]
Senior Business Development Manager
Aberdeen Asset Management
161 Bay St, 44th Fl
TD Canada Trust Tower
Toronto, ON M5J 2S1
CANADA
Work: (416) 777-5572
kimberley.woolverton@aberndeen-asset.com

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CHAIR

Proprietary Capital, LLC

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Icon Global Strategies

KURT TERRIEN

Clarkston Capital Partners

REGIONAL EVENT CHAPTER CONTACTS

ATLANTA

GREG BAUER

Parametric Portfolio Associates

DEREK TUBBS

CornerCap Investment Counsel

BOSTON

GREG WEISSMAN

Putnam Investments

KEITH WOSNESKI

Acadian Asset Management LLC

CALIFORNIA

HEATHER BEATTY

First Eagle Investment Management, LLC

CHICAGO

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DENVER

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NEW YORK

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Federated Investors, Inc.

JOHN LARSON

Syntax, LLC

PORTLAND

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First Eagle Investment Management, LLC

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Eaton Vance

SEATTLE

HEATHER BEATTY

First Eagle Investment Management, LLC

RODRIGO SOTO

Eaton Vance

ST. LOUIS

GUS CATSAVIS

Pinnacle Asset Management, L.P.

TEXAS

MATT PAWLAK

Dimensional Fund Advisors

MARK ROBERTSON

Proprietary Capital, LLC

TORONTO & MONTREAL

JAY WILTSHIRE

Greystone Managed Investments, Inc.

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FEATURED SPEAKER HIGHLIGHTS

MONDAY, MAY 1



8:15-9:15 am

KEYNOTE PRESENTATION
BY DR. GIO VALIANTE
Fearless, Focused and
Mentally Free: Key Findings
from Performance Psychology
that Work!



9:50-10:35 am

FEATURED CONSULTANT:
CAMBRIDGE ASSOCIATES
Noel O'Neill
Head of Global Investment
Research



1:10-2:10 pm

KEYNOTE PRESENTATION
BY FILIPPO BARTOLOTTA
Wine Speak

TUESDAY, MAY 2



8:00-9:15 am

KEYNOTE PRESENTATION
BY BUDDY BUSH
Tackling Challenges of the
Multigenerational Workforce



9:35- 10:25 am

FEATURED CONSULTANT:
NEPC
Michael Manning, CFA, CAIA
Managing Partner

AIMSE MOBILE APP

POWERED BY CROWDCOMPASS

Features of the app include:

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

Available for download on the App Store or Google Play



SCHEDULE AT A GLANCE



SUNDAY, APRIL 30

7:00–8:00 am	Golf Tournament Registration & Breakfast East Princess Plaza
8:00 am–12:00 pm	Golf Tournament TPC Scottsdale Stadium Course
10:00–11:30 am	Golf Clinic TPC Scottsdale
12:00–1:30 pm	Luncheon for Golf Tournament and Clinic Participants Toro Thunderbird Patio
1:00–3:30 pm	AIMSE Boot Camp (Basic Program) Princess Salon I
3:30 - 5:30 pm	AIMSE Boot Camp (Advanced Program) <i>Skills and Knowledge Track</i> Princess Salon I AIMSE Boot Camp (Advanced Program) <i>Investor Track</i> Princess Salon H
4:00–8:00 pm	Conference Registration Princess Ballroom Foyer
6:00–6:30 pm	Newcomer & Mentor Reception Ironwood Room
6:30–9:30 pm	Welcome & Exhibitor Reception Princess Salons F & G

MONDAY, MAY 1

7:00 am–1:30 pm	Conference Registration Princess Ballroom Foyer
7:00–8:00 am	Breakfast with Exhibitors Princess Salons F & G
8:00–8:15 am	AIMSE President's Welcome Princess Salons H & I
8:15–9:15 am	KEYNOTE PRESENTATION BY DR. GIO VALIANTE <i>Fearless, Focused and Mentally Free: Key Findings from Performance Psychology that Work!</i> Princess Salons H & I

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9:15–9:35 am	Refreshment Break with Exhibitors Princess Salons F & G
9:40–9:50 am	A Word from our Partners Princess Salons H & I
9:50–10:35 am	FEATURED CONSULTANT: CAMBRIDGE ASSOCIATES Noel O’Neill Head of Global Investment Research Cambridge Associates Princess Salons H & I
10:45–11:40 am	Concurrent Breakout Sessions SESSION 1: CORPORATE PENSION PLANS – THE CHANGING LANDSCAPE Princess Salon D SESSION 2: THE FUTURE OF PUBLIC PENSION INVESTING Princess Salon E
11:45 am–1:00 pm	Networking Lunch with Exhibitors <i>The Impact of The DOL Fiduciary Rule on Asset Managers</i> Princess Salons F & G
1:00–1:10 pm	A Word from our Partners Princess Salons F & G
1:10–2:10 pm	KEYNOTE PRESENTATION BY FILIPPO BARTOLOTTA <i>Wine Speak</i> Princess Salons F & G
2:10–2:30 pm	Refreshment Break with Exhibitors Princess Salons F & G
2:30–3:25 pm	Concurrent Breakout Sessions SESSION 3: INSURANCE INVESTING – KEY CONSIDERATIONS Princess Salon D SESSION 4: MANAGING LONG-TERM ENDOWMENTS IN THE MIDST OF UNCERTAINTY Princess Salon E
4:30–6:45 pm	Optional Outdoor Activities ♦ Tennis Tournament Sanctuary Resort at Camelback Mountain <i>Transportation will be provided for participants. Transfer time from Fairmont Scottsdale Princess is approximately 20-30 minutes.</i> ♦ Volleyball Tournament Lagoon Lawn



7:30–8:00 pm

Cocktail Reception

Princess Plaza

8:00–11:00 pm

DINNER & AIMSE LOTHROP AWARD PRESENTATION

Princess Salons H & I

TUESDAY, MAY 2

7:00 am–1:30 pm

Conference Registration

Princess Ballroom Foyer

7:00–8:00 am

Breakfast with Exhibitors & AIMSE Annual Business Meeting

Princess Salons F & G

8:00–9:15 am

KEYNOTE PRESENTATION BY **BUDDY BUSH**

Tackling Challenges of the Multigenerational Workforce

Princess Salons H & I

9:15–9:35 am

Refreshment Break with Exhibitors

Princess Salons F & G

9:35–10:25 am

FEATURED CONSULTANT: NEPC

Michael Manning, CFA, CAIA

Managing Partner

NEPC

Princess Salons H & I

10:30–11:25 am

Concurrent Breakout Sessions

SESSION 5: BLURRING THE LINES – ACTIVE, PASSIVE & ALTERNATIVES

Princess Salon D

SESSION 6: WHITE LABELING AND NEW PRODUCT PANEL

Princess Salon E

11:30 am–1:20 pm

Consultant Roundtables

Palomino 8-10

1:20–2:20 pm

Networking Lunch with Exhibitors

Princess Salons F & G

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EXTENDED SCHEDULE

SUNDAY, APRIL 30

7:00–8:00 am Golf Tournament Registration & Breakfast
East Princess Plaza

8:00 am–12:00 pm Golf Tournament
TPC Scottsdale Stadium Course

10:00–11:30 am Golf Clinic
TPC Scottsdale

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

12:00–1:30 pm Luncheon for Golf Tournament and Clinic Participants
Toro Thunderbird Patio

1:00–3:30 pm AIMSE Boot Camp (Basic Program)
Princess Salon I

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

Topics will include:

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

MODERATORS

Michael Gillis

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

Chris Rae

Managing Director
Elevation Marketing Advisory



3:30 - 5:30 pm

AIMSE Boot Camp (Advanced Program)

The following programs are part of the Advanced Program. Attendees of the Basic Program are encouraged to stay for the Advanced Programs. No prior Boot Camp experience is necessary!

SKILLS AND KNOWLEDGE TRACK

3:30 - 4:30 pm

Writing a Marketing Plan and Other Marketing Skills

Princess Salon I

This session will focus on developing a coherent marketing plan. Regardless of whether you are new to the business or run an experienced team, this session will be focused on helping you to write a custom marketing plan.

MODERATORS

Michael Gillis

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

Dick Hoag

Senior Institutional Sales and Client Service
Sawgrass Asset Management, LLC

4:30 - 5:30 pm

Maximizing CRM and Performance Modeling

Princess Salon I

This session will focus on the vocational and technical skills for building and maximizing your client relationship management ("CRM") system as well as basic performance modeling for marketers. This session will focus on analyzing investment performance the way that an investor or consultant does.

MODERATOR

Chris Rae

Managing Director
Elevation Marketing Advisory

INVESTOR TRACK

3:30 - 4:30 pm

Marketing to Consultants

Princess Salon H

This session will focus on targeting, engaging, and succeeding with investment consultants. We will focus on understanding their role within the industry as well as their organizational structure and process.

MODERATORS

Maureen Kennedy Hays

Managing Director, Consultant Relations
Principal Global Investors

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Carolyn Patton, CFA

Managing Director, Global Client Group
Deutsche Asset Management

4:30 – 5:30 pm

Marketing to Endowments and Foundations

Princess Salon H

This session will focus on targeting, engaging, and succeeding with endowments & foundations. We will focus on better understanding the “endowment model” which has become the standard for modern institutional investors.

MODERATOR

Dale Kindregan

Executive Director, Endowments and Foundations
UBS Asset Management (Americas)

4:00–8:00 pm

Conference Registration

Princess Ballroom Foyer

6:00–6:30 pm

Newcomer & Mentor Reception

Ironwood Room

6:30–9:30 pm

Welcome & Exhibitor Reception

Princess Salons F & G

MONDAY, MAY 1

7:00 am–1:30 pm

Conference Registration

Princess Ballroom Foyer

7:00–8:00 am

Breakfast with Exhibitors

Princess Salons F & G

8:00–8:15 am

AIMSE President’s Welcome

Princess Salons H & I

8:15–9:15 am

KEYNOTE PRESENTATION BY DR. GIO VALIANTE

Fearless, Focused and Mentally Free:

Key Findings from Performance Psychology that Work!

Princess Salons H & I

An achievement domain is defined as any field with a measurable score. There is abundant psychological research that explores how people think, feel, and act while working in high pressure achievement domains (sports, markets, sales, and academia to name a few), and the types of attitudes, beliefs, and habits that lead to the best outcomes. Dr. Valiante will lay out the key psychological factors that his clients – some of the best in the world at their respective crafts – demonstrate to push the boundaries of ultimate human performance... all with



an eye to helping participants develop a better understanding of themselves, the conscious and unconscious factors that impact their thinking, and how these factors interact with their personal lives to give them a psychological advantage in the competitive landscape.

9:15–9:35 am

Refreshment Break with Exhibitors
Princess Salons F & G

9:40–9:50 am

A Word from our Partners
Princess Salons H & I

9:50–10:35 am

FEATURED CONSULTANT: CAMBRIDGE ASSOCIATES

Noel O'Neill

Head of Global Investment Research
Cambridge Associates
Princess Salons H & I

Cambridge Associates is a global investment firm founded in 1973 that builds customized investment portfolios for institutional investors and private clients around the world. Working alongside its early clients, among them several leading universities, the firm pioneered the strategy of high equity orientation and broad diversification, which since the 1980s has been a primary driver of performance for these leading fiduciary investors. Cambridge Associates serves over 1,000 global investors – primarily foundations and endowments, pensions and family offices – and delivers a range of services, including outsourced investment (OCIO) solutions, traditional consulting services, and access to research and tools across global asset classes. Cambridge Associates has more than 1,200 employees – including over 150 research staff – serving its client base globally. The firm maintains offices in Arlington, VA; Boston; Dallas; Menlo Park and San Francisco, CA; London; Singapore; Sydney; and Beijing. Cambridge Associates consists of five global investment consulting affiliates that are all under common ownership and control. For more information about Cambridge Associates, please visit www.cambridgeassociates.com.

10:45–11:40 am

Concurrent Breakout Sessions

SESSION 1: CORPORATE PENSION PLANS – THE CHANGING LANDSCAPE

Princess Salon D

Corporate pension plans oversee roughly \$2 trillion in assets under management. The Pension Benefit Guaranty Corporation estimates that about 30 million Americans are earning pensions from the roughly 44,000 single employer pension plans in the US. Over the recent years, we have seen an acceleration in the transition from traditional defined benefit (DB) pension plans to defined contribution (DC) pension arrangements. Have DC plans won the pension war? Will DB plans gradually disappear? Will DC plans be able to deliver a desired level of retirement income? What will the pension plans of the future look like? During this session, we will explore the perspectives of corporate pension investment professionals and how they are

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managing not only the volatile equity markets, but also the low interest rate environment and discuss some of the trends in pension plan design, management and regulation, and the impact they have on how plan assets are invested.

MODERATOR

Brian Lee

Director of Marketing & Client Service
Oberweis Asset Management, Inc.

SPEAKERS

Brian Birnbaum, CFA

Senior Vice President
Graystone Consulting

Thomas C. Foster, CFA

Director, Pension & Trust Investments
Pinnacle West Capital Corporation

Joe Thomas, CFA

Director, Investments
BJC Healthcare

SESSION 2: THE FUTURE OF PUBLIC PENSION INVESTING

Princess Salon E

Marketing to Public Pension Plans is as complicated as it ever has been. The increased role of the consultant, the strengthening of the staff's credentials and the complexity of rules governing interactions with board members should give us all a reason to sit back and examine our approaches. This panel of Public Plan experts will deconstruct the roles involved in running a Public Pension Plan, their interactions with their trusted advisors as well as answering your questions on how to best pursue meeting with them. Join us as we put a microscope on the process and how you can best approach the largest source of investable assets in the United States.

MODERATOR

Larry Pokora

Global Director of Investor Relations & Marketing
LibreMax Capital

SPEAKERS

Larry Krummen, CFA

Chief Investment Officer
Missouri Department of Transportation

Kevin Leonard

Director of Public Fund Consulting
NEPC



M. Steve Yoakum

Executive Director

Public School Retirement System of Missouri

11:45 am–1:00 pm

Networking Lunch with Exhibitors

The Impact of The DOL Fiduciary Rule on Asset Managers

Princess Salon F & G

The election of Donald Trump, along with a unified Republican Congress, has generated tremendous anticipation for potential changes in the financial services sector. Gib Watson, President Emeritus of Envestnet Asset Management, will provide us with an update on the impact of the DOL Fiduciary Rule on asset managers under the current Administration and how Envestnet is positioned for potential regulatory changes.

SPEAKER

J. Gibson Watson III, CIMA

Industry Consultant and Group President Emeritus

Envestnet Asset Management, Inc.

1:00–1:10 pm

A Word from our Partners

Princess Salon F & G

1:10–2:10 pm

KEYNOTE PRESENTATION BY **FILIPPO BARTOLOTTA**

Wine Speak

Princess Salon F & G

Ever been in a restaurant and handed the wine list and feel a bit lost? The sommelier pours you a taste and the first and last thing on your mind is how not to splash it all over your client's shirt? Not sure if the cork smells like good cork or if the wine smells badly corked? You are convinced something smells like bad eggs but how do you not act obnoxious while returning the wine?

No fret, Filippo will unleash your senses and show you how to select, sniff, swirl, and sip with aplomb. You will walk away with confidence in ordering wine for all occasions, and not dread the boss handing you the wine binder ever again. Plus, you'll have fun doing it!

2:10–2:30 pm

Refreshment Break with Exhibitors

Princess Salon F & G

2:30–3:25 pm

Concurrent Breakout Sessions

SESSION 3: INSURANCE INVESTING – KEY CONSIDERATIONS

Princess Salon D

The insurance market differs from other institutional markets and is facing increased regulation requiring more specific investment needs. Leaders in the insurance industry will highlight trends in various segments of the institutional insurance marketplace, focusing on asset flows and guidance on the most effective way to partner with this channel.

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MODERATOR

Luke Schlafly, CFA

Senior Vice President, Head of Insurance Development, Americas
PineBridge Investments

SPEAKERS

Larry Cochran

Chief Investment Officer, Head of Treasury
ProAssurance Corporation

Andrew Coupe

Senior Insurance Investment Consultant
Willis Towers Watson

Kent Knudsen, CFA

Senior Vice President, Alternative Investments
Mutual of Omaha

Timothy Matson, CFA

Chief Investment Officer
Reinsurance Group of America, Incorporated

SESSION 4: MANAGING LONG-TERM ENDOWMENTS IN THE MIDST OF UNCERTAINTY

Princess Salon E

Boards and investment offices struggle daily to find the right balance among risk, return and liquidity in a constantly shifting investment landscape. Balancing short-term and long-term goals can be very difficult in a world where global economic forces, geopolitical landscapes and global securities markets can change on a dime. Most larger universities, foundations and non-profit healthcare organizations continue to implement the endowment model for their long-term pools of capital. Has the substantial allocation to active, alternative investments worked over the long-term? Can investment staffs add value via strategic or tactical asset allocation or manager selection? Has alpha “dried up” in certain hedge funds, private equity, real estate and other real assets due to big flows from retail and public fund dollars? What is a reasonable annual return objective for the next five years? How should long-term investors look at passive investments versus active? What is the best way to interact with your peers regarding managers, asset allocation and IC management? Our panel of CIO’s plan to address these questions, plus give you insights on how they have successfully navigated challenging investment environments over their careers and how they plan to sail forward in 2017 and beyond. This panel will be very interactive with the audience so bring your questions!



MODERATOR

Dale Kindregan

Executive Director, Endowments and Foundations
UBS Asset Management (Americas)

SPEAKERS

Tim Barrett, CFA

Associate Vice Chancellor & Chief Investment Officer
Texas Tech University System

Michael Condon, CFA

Senior Vice President, Institutional Investments
Fund Evaluation Group

Tony O'Toole

Chief Financial & Investment Officer
Truth Initiative

4:30–6:45 pm

Optional Outdoor Activities

♦ Tennis Tournament

Sanctuary Resort at Camelback Mountain

Tennis facilities are located at Sanctuary Resort at Camelback Mountain.

Transportation will be provided for participants. Transfer time from Fairmont Scottsdale Princess is approximately 20-30 minutes.

♦ Volleyball Tournament

Lagoon Lawn

7:30–8:00 pm

Cocktail Reception

Princess Plaza

8:00–11:00 pm

DINNER & AIMSE LOTHROP AWARD PRESENTATION

Princess Salons H & I

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

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

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LOTHROP AWARD WINNERS

JAMES MANLEY
Jim Manley Associates

JOHN SEITER
Capital Guardian Trust

SHARON HOUGH
Pequot Capital

MICHAEL FISHER
Barclays Global Investors

VICTOR ZOLLO
DePrince, Race & Zollo, Inc.

DICK GRAF
Corinthian Cove Consulting

JERRY DEVORE
Atlanta Capital Management

FRANK MINARD
XT Capital Partners

EUGENE WALDRON
Capital Guardian Trust Company

JAMES WOOD
JRW Partners

OBIE MCKENZIE
BlackRock

JOHN "RICK" ROCKWELL
T. Rowe Price

MARLIS S. FRITZ
AXA Rosenberg Investment Management

DICK HOAG
Sawgrass Asset Management, LLC

NEAL HOWE
Welton Investment Partners LLC

TIM MCAVOY
DePrince, Race & Zollo, Inc.

JIM SKESAVAGE
Atlanta Capital Management

TUESDAY, MAY 2

7:00 am–1:30 pm

Conference Registration
[Princess Ballroom Foyer](#)

7:00–8:00 am

Breakfast with Exhibitors & AIMSE Annual Business Meeting
[Princess Salons F & G](#)

8:00–9:15 am

KEYNOTE PRESENTATION BY **BUDDY BUSH**
Tackling Challenges of the Multigenerational Workforce
[Princess Salons H & I](#)

Henry David Thoreau wrote, "Every generation laughs at the old fashions, but follows religiously the new." He may have been correct, but for those of us who cannot retreat to the woods, it is imperative that all ages learn to work together. To do so, an important first step is to understand the historical and societal trends that have shaped each generation. With three (maybe four) generations in the workplace, that is often easier said than done. Buddy Bush from JB Training Solutions is here to give us that historical perspective and actionable advice to help bridge the gap among all generations.



9:15–9:35 am

Refreshment Break with Exhibitors

[Princess Salons F & G](#)

9:35–10:25 am

FEATURED CONSULTANT: NEPC

Michael Manning, CFA, CAIA

Managing Partner

NEPC

[Princess Salons H & I](#)

NEPC provides advisory and outsourced chief investment officer (OCIO) services to clients looking for passionate advisors delivering deeply-researched, custom solutions. Our focus on clients and love for investing defines everything we do and offer to clients. This focus reinforces our desire to stay independent, provide leading investment research across the liquidity spectrum through our nearly 50-person research team, create solutions that go beyond just investments, and to provide exceptional service to our clients. Our unique culture and independence attracts some of the finest professionals in the industry, including over 250 professionals located across the U.S. Lastly, this focus has led to our success, attracting over 350 clients with aggregate assets of over \$900 billion in seven specialty practices, including endowments and foundations, healthcare, private wealth, corporate pension, defined contribution, public pension, and Taft-Hartley funds. We would welcome the opportunity to partner with you and show you the difference our unique culture delivers to our clients.

10:30–11:25 am

Concurrent Breakout Sessions

SESSION 5: BLURRING THE LINES - ACTIVE, PASSIVE & ALTERNATIVES

[Princess Salon D](#)

Passive and active strategies each serve different roles within a portfolio and can perform better in certain market environments. With broad equity markets at the higher end of their historical valuation range and fixed income facing a potential rising interest rate headwind, capturing passive beta alone is unlikely to achieve returns that most institutional investors need to support their liability streams, budgets or spending schedules. Adding to this challenge, the recent underperformance of active strategies has not met expectations. With basis points at a premium and fiduciaries under a microscope, what's the best solution?

Please join us for a lively discussion on the Active vs. Passive vs. Alternative debate, during which we'll address topics such as:

- ◆ Performance reversion: are active managers poised to outperform going forward
- ◆ The trend towards lower fees for all strategies – is this really the solution
- ◆ Where do hedge fund strategies fit in the search for excess returns – winning & losing strategies
- ◆ Impact of passive investing on consultants' diversified model of portfolio construction

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- ♦ Growth of high active share funds and unconstrained strategies as the new “alternatives”
- ♦ Realities of passive beta products being used to implement thematic or tactical positions
- ♦ Trend in hedge fund managers moving into long-only mandates
- ♦ Are new smart-exotic-alternative beta products effectively & cheaply capturing micro risk premiums

MODERATOR

Joseph D. Taiber, CFA

Managing Partner
Taiber Kosmala & Associates, LLC

SPEAKERS

Sandra M. Ackermann-Schaufler, CFA

Head of International and Emerging Markets Equity & Senior Portfolio Advisor
SEI - Investment Management Unit

Alex Farquhar, CFA

Senior Consultant & Director of Traditional Manager Research
Ellwood Associates

Darrel Pfeifauf

Senior Vice President, Research
Summit Strategies Group

SESSION 6: WHITE LABELING AND NEW PRODUCT PANEL

Princess Salon E

White label funds combine various investment vehicles in one “non-branded” investment option. The white label structure is on the rise because it allows for the use of a wider range of complementary investment styles and makes ongoing manager changes easier and less disruptive. The white label trend has far reaching implications because it grants much greater flexibility to choose and combine investment managers, opening doors for some and closing doors for others. This session will provide attendees with fluency in the white label concept and explain the forces behind the growth in white labelling and the impact a white label world will have on buyers, sellers and investors.

MODERATOR

Holly Verdeyen

Director, Defined Contribution Investments
Russell Investments

SPEAKERS

Brian S. Donoghue

Partner
NEPC



Chris Lakatosh, CFP, AIF

Principal & Senior Consultant
Cornerstone Institutional Investors, Inc.

Ken Menezes, CFA

Managing Director, Asset Management
American Airlines, Inc.

11:30 am–1:20 pm

Consultant Roundtables

Palomino 8-10

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

MODERATORS

Kartini Wilson

Managing Director, North American Consultant Relations
Man Group

Keith Wosneski

Senior Vice President, Senior Consultant Relations Officer
Acadian Asset Management LLC

SPEAKERS

Alex Bastin, CAIA

Fund Relationship Manager
Albourne America LLC

Paige Daniel

Managing Director
Highland Associates

Vincent Francom, CFA, CAIA

Senior Associate Director, Public Markets
Verus

Ramon Gonzalez, CFA

Vice President
Wilshire Associates

Matt Mullarkey, CFA

Head of Advisory, Americas
Aksia

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David Sancewich

Managing Director
Pension Consulting Alliance

Evan Scussel, CFA, CAIA

Head of Equity Investments
AndCo Consulting (formerly known as The Bogdahn Group)

Susanne Wei, CFA

Senior Associate, Hedge Fund Research
Cliffwater

Bryon Willy, CFA

Principal
Mercer

1:20–2:20 pm

Networking Lunch with Exhibitors
[Princess Salons F & G](#)

Coming together is a beginning;
keeping together is progress;
working together is success.

-Henry Ford

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CONFERENCE CHAIRS



Mark Robertson*

Co-Chair
Director of Business Development
Proprietary Capital, LLC

Mark Robertson is the Director of Business Development at Proprietary Capital in Denver, Colorado. Prior to joining Proprietary, Mr. Robertson was the COO and Founding Partner of Silvergate Capital Management, a Denver based health care hedge fund. Prior to starting Silvergate, Mr. Robertson was a Vice President at Morgan Stanley in New York City.

He worked in the Institutional Equity Division selling the firm's equity products to US based asset managers. Mr. Robertson started his career in investment management at Paine Webber selling the firm's diversified research product to West Coast based asset managers.

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



Miriam Tai*, CFA, CAIA

Co-Chair

Miriam Tai was most recently Managing Director at CIFC Asset Management, where she was responsible for managing consultant relationships and business development. Previously, she was Global Head of Consultant Relations at Itaú Asset Management, a Brazilian manager specializing in Latin American investments. Prior to Itaú, she was Head of U.S. Consultant Relations at Man Investments and a Director of Consultant Relations at BlackRock (formerly BGI). Before her asset management days, she spent

time in structured finance as well as management consulting. Miriam has a MBA from the Haas School of Business, UC Berkeley, and an A.B. in Political Science from the University of Chicago. She holds both the CFA and CAIA designations. She is a native from Hong Kong, fluent in Cantonese and passable in French and Portuguese. She spends her spare time on circus activities, golf, teaching Pilates, and traveling.

**Indicates Annual Conference Committee Member*

MODERATORS, SPEAKERS & CONFERENCE COMMITTEE



Sandra M. Ackermann-Schaufler, CFA

Head of International and Emerging Markets Equity & Senior Portfolio Advisor
SEI – Investment Management Unit

Sandra Ackermann-Schaufler serves as a Portfolio Manager for the Investment Management Unit for global, international and emerging markets equities. In this role, she is responsible for the management of the portfolios and the oversight of research, selection and ongoing evaluation of global, international and emerging markets equity managers for the SEI Funds.

Prior to joining SEI in 2009, Sandra was a Senior International Equity Analyst and Portfolio Manager of Merrill Lynch's multi-manager strategies, where she managed the firm's strategic and dynamic international equity portfolios and was in charge of the fund analysis of global, international and emerging markets investment managers as well as commodity related investment vehicles through a combination of quantitative and qualitative analysis combined with in-person interviews. Previously, she was a Senior Equity Analyst at Zircon Asset Management.

Sandra has also served as Chief Investment Officer and Lead Portfolio Manager for three international closed-end mutual funds at Deutsche Asset Management. Earlier in her career, she was a Marketing Analyst at HVB Capital Markets, a Portfolio Manager and Equity Analyst at Deutsche Asset Management in Frankfurt, Germany and a Portfolio Manager at Allianz Asset Management in Munich, Germany.



Alex Bastin, CAIA

Fund Relationship Manager
Albourne America, LLC

Alex oversees Albourne's Fund Relations efforts in the U.S. by helping managers better understand their business, process, rating methodology and coverage model.



Greg Bauer*, CFA, CAIA

Director, Institutional Relationships
Parametric Portfolio Advisors

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.

**Indicates Annual Conference Committee Member*

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**Tim Barrett, CFA**

Associate Vice Chancellor and Chief Investment Officer
Texas Tech University System (TTUS)

Mr. Tim Barrett is Associate Vice Chancellor and Chief Investment Officer for Texas Tech University System (TTUS). Mr. Barrett is responsible for day-to-day management of the Endowment Assets and responsible for Investment Strategy and Implementation of the nearly \$1 Billion endowment. Mr. Barrett began his relationship with TTUS in April of 2013. Prior to TTUS, Mr. Barrett served as Director of Pension Investments Worldwide

at Eastman Kodak, overseeing more than \$16 Billion in aggregate through approximately 77 plans globally. Mr. Barrett began his relationship with Kodak in November of 2010.

Mr. Barrett began his career with San Bernardino County Employees' Retirement Association (SBCERA) where he worked his way up the organization to become the Executive Director & Chief Investment Officer. Mr. Barrett began his career in 1996 with SBCERA and left in October of 2010.

Mr. Barrett has approximately 15 years of experience as a CIO and has restructured plans around the world within the three pillars of institutional investors- pension, corporate and endowment. He is a published co-author and winner of the Edward D. Baker III Award by the Investment Management Consultants Association for an article entitled "Dynamic Beta-Getting Paid to Manage Risk." Mr. Barrett is also a member of the inaugural aiCIO Power 100 and has been awarded many awards for managing best of breed plans.

Mr. Barrett is married to his lovely wife, Jo-Anna. They currently reside in Austin, Texas and have two boys that are quickly learning to play football, Texas style!

**Filippo Bartolotta**

Le Baccanti Tours

Born in Florence, Tuscany, Filippo Bartolotta is a passionate wine journalist, educator, writer, and globetrotter. His career in the wine world started at London's Vinopolis, the world's largest wine museum, where he was the corporate wine tasting manager. From there, he became one of Decanter Magazine tasting judges and journalists. In 2004, he founded, Le Baccanti Tours, one of Italy's premier gourmet event and travel agencies. In 2014, he also founded the beautiful cooking and wine school MaMa Florence.

As docent in several universities, Filippo shares his passion through teaching and live demonstrations. As a columnist for wine magazines, he tastes a few thousand wines a year and still manages to walk straight! As a motivational speaker, Filippo has been implementing food and wine projects for social and corporate entertainment for over a decade, combining both fun and expertise. Filippo is passionate about sharing his experience with first timers as well as seasoned professionals.

**Brian Birnbaum, CFA**

Senior Vice President
Graystone Consulting

Brian Birnbaum is Senior Vice President at Graystone Consulting/Morgan Stanley Private Wealth Management. Brian joined Graystone Consulting in April 2016, rejoining the team, when they moved over from Credit Suisse. Brian works with clients in the areas of asset allocation and investment policy development, manager selection and ongoing program monitoring. Prior to joining Graystone, Brian was a Senior Partner and Head of US Strategic

Research for Mercer Investments where he developed the strategic investment advice that Mercer implemented



within all of its client portfolios. In addition, Brian was the lead consultant on approximately \$20 billion in client assets.

Prior to joining Mercer in 2010, Brian was the Director and Head of Credit Suisse's institutional consulting arm, Investment Management Consulting Services. Before joining Credit Suisse, Brian was a principal with Ennis Knupp & Associates and a senior consultant to a number of public retirement system, corporate pension, private foundation and high net worth clients. Brian also led the firm's effort in U.S. equity and fixed income manager research. In addition, he has authored a number of technical papers and is a frequent speaker at conferences on topics ranging from risk management to investment best practices and fixed income portfolio management. Brian's investment management experience included time with Aon Advisors, where he managed fixed income portfolios, performed equity analysis and implemented derivative strategies. He has over twenty years in institutional investment experience.

Brian received his Bachelors in Business Administration in Finance from Loyola University Chicago. He is a CFA charter holder and is a member of the CFA® Society of Chicago and the CFA® Institute.



Brad Burke*, CFA

Senior Vice President and Head of Global Consultant Relations
Two Sigma Investments, LLC

Brad Burke joined Two Sigma Investments in July 2012 to lead the firm's Consultant Relations effort. Prior to joining the firm, Mr. Burke was Director in Global Consultant Relations at BlackRock, where he managed a team responsible for relationships with both regional and global consulting firms. Mr. Burke was also the primary relationship contact for several global firms. Mr. Burke held a similar role at BGI when the firm was acquired by BlackRock in 2009. Prior to this, Mr. Burke was Director of Consultant Relations and Client Management at GE Asset Management. In these roles, he served as the primary relationship contact for national and regional consulting firms in the Western United States, managed client relationships, and conducted independent portfolio reviews for clients. Mr. Burke earned a master's degree from the University of California, Irvine and a bachelor's degree from New York University. Mr. Burke is also a CFA charterholder and Member of the New York Society of Security Analysts.



Buddy Bush

Director of Learning and Development
JB Training Solutions

Buddy Bush is Director of Learning and Development at JB Training Solutions, a company dedicated to helping professionals succeed in the workplace. With a diverse management background spanning corporate real-estate to work/life benefits, Buddy brings energy, enthusiasm and a real-world approach to each workshop. Buddy has partnered with high performing companies such as PepsiCo, Digitas LBi, Abbott Laboratories, and Exelon.

Her passion for presenting started at the age of 7 with her younger brother as her muse. In her former role as a Vice President at commercial real-estate firm Grubb & Ellis, she led the marketing, communications and market research department.

Buddy applies her passion for business and training by developing "Down-&-Dirty-in-30 Book Reports" for today's top selling business books, including "Lie Spotting" by Pamela Meyer, "Good to Great" by Jim Collins and "Start with Why" by Simon Sinek. When Buddy isn't training in the business world—you can find her training yogis at Core Power Yoga where she is an instructor. Buddy is a LEED AP and holds a Bachelor of Science in Political Science from the University of Colorado at Boulder.

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**Lawrence K. Cochran**

Chief Investment Officer, Head of Treasury
ProAssurance Corporation

Lawrence K. Cochran (Larry), Chief Investment Officer, Investments & Treasury of ProAssurance Corporation, is responsible for the Investment Portfolio for all ProAssurance companies, including macro asset allocation, duration, tax allocation, compliance, alternative investments, and external manager and custodial relationships. He also oversees Corporate Treasury, which includes Banking, Debt Management, Capital Markets, Cash Management, Accounts Receivable, Accounts Payable, Claim Payments and Travel.

Larry and his staff also support the Investment Accounting and External Reporting areas of Accounting in regards to investment disclosures for SEC and NAIC reporting. Larry is also a member of the 401K Committee. He joined ProAssurance in 2002.

During his 13 years on the staff of Compass Bancshares (now BBVA Compass) he served in three capacities: Manager, Investment Accounting; Assistant Vice President, Senior Liability Trader; and Vice President, Bond Trading, where he also served as Derivatives Trading support.

Larry received a Bachelor's in International Trade from Auburn University and previously held a Series 7 license.

**Michael Condon, CFA**

Senior Vice President, Institutional Investments
Fund Evaluation Group

Michael (Mike) A. Condon, CFA, is Senior Vice President of Institutional Investments at Fund Evaluation Group, LLC (FEG). Condon works with Endowment and Foundation (E&F) clients within FEG's outsourced chief investment officer (OCIO) service.

A long-time thought leader within the E&F space, Condon brings more than 20 years of experience as an acting CIO. Most recently as CIO at Southern Methodist University, he led a 15-person office and was responsible for all aspects of investing the university's \$1.5 billion endowment. As CIO for the University of Arkansas Foundation, Condon oversaw a \$1.1 billion endowment. During his 10-year tenure at Georgia Tech, the foundation endowment grew from \$440 million to \$1.5 billion. Additionally, Condon is on the Editorial Committee for The Investment Institute, and on advisory boards for Institutional Investor and Alternative Investment Management, LLC.

**Andrew Coupe**

Senior Insurance Investment Consultant
Willis Towers Watson

Andrew Coupe is a Senior Investment Consultant in the New York office of Towers Watson Investment Services, Inc. (TWIS). Andrew is a senior member of the Insurance Investment Advisory Group (IIAG), which specializes in providing investment strategy and thought leadership to insurance companies, primarily focusing on general account assets.

Andrew works with insurers across the industry, including Life, Health and P&C clients. He provides a full range of investment services including advising on enterprise based asset allocation strategy, risk budgeting, investment policy, structure & governance, asset/liability modeling, and manager selection, monitoring and evaluation.



Prior to joining Towers Watson, Andrew was Vice President and Investment Consultant at WellsCanning, a boutique investment consulting firm which specialized in providing investment advice to the insurance industry. WellsCanning was acquired by Towers Watson on October 1st, 2011.



Matthew J. Crowe*

Director of Marketing & Investor Relations
Proprietary Capital, LLC

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

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



Paige Daniel

Managing Director
Highland Associates

Ms. Daniel joined Highland Associates in 2006 as a consultant to the firm's institutional base. She is currently a managing director and shareholder in the firm. Ms. Daniel is also an active member of the investment committee and leadership team. Prior to joining Highland Associates, she was director of alternative strategies with AmSouth Bank's Wealth Management Group. Ms. Daniel also worked in the Private Client Group at CIBC Oppenheimer and as a financial advisor with Quick and Reilly. She earned her Bachelor of Arts in Economics from Vanderbilt University and her Master of Business Administration from Georgia State University.



Brian S. Donoghue

Partner
NEPC

Brian's investment experience dates back to 1996 and he joined NEPC in 2006. As a partner at NEPC Brian works with defined contribution plans in all aspects of plan design and evaluation. He is a member of NEPC's Due Diligence Committee and the Fixed-Income Advisory Group. Brian regularly speaks at conferences and co-authored pieces for NEPC, including "Mapping – What the New Regulations Suggest for Defined Contribution Plans," and "Stable Value on the Brink, But Surviving." Brian has helped defined contribution plans of all sizes build and maintain white label investment offerings including target date funds and style funds for their participants.

Prior to joining NEPC, Brian spent eight years working at Fidelity Investments where he helped plan sponsors build and maintain their defined contribution programs.

Brian received his M.B.A. from Clark University's Graduate School of Management and his B.A. in Finance from the University of Massachusetts at Amherst.

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**Alex Farquhar, CFA**

Senior Consultant & Director of Traditional Manager Research
Ellwood Associates

Alex Farquhar is a Senior Consultant at Ellwood Associates and joined the firm in 2000. Alex has been Director of Traditional Manager Research since 2011. In this role he is responsible for managing our investment manager research process and for investment surveillance of current client managers. Previously, Alex was the head of our Fixed Income and International Equity Research teams. Alex consults to corporate retirement, endowment, foundation, healthcare, and high-net-worth clients. Prior to joining the consulting team, Alex worked as a Senior Research Analyst. Alex holds the Chartered Financial Analyst designation and is a member of the CFA Institute and the CFA Society of Chicago. Alex received his BS from University of Arizona in Tucson, Arizona. A Vancouver native, he provides a Canadian point of view to the firm.

**Vincent Francom, CFA, CAIA**

Senior Associate Director, Public Markets
Verus

Mr. Francom has over 22 years of institutional investment management experience in various roles as both an equity analyst and a portfolio manager. He joined Verus in 2011 and is currently a member of the manager research group, where he is responsible for research, analysis and evaluation of domestic equity investment managers. Prior to joining the manager research group, Mr. Francom was a senior consulting associate, providing in-depth research, analysis, and consulting support to the Seattle-based consulting team.

Previously, Mr. Francom was a senior equity analyst & co-portfolio manager with Safeco Insurance and later held a similar role with a startup investment management boutique. He began his investment career at First Interstate Bank (now Wells Fargo) as an equity research analyst.

Mr. Francom graduated from the University of Washington with a bachelor of arts degree (BA) in business administration with an emphasis in finance. He is a CFA charter holder (Chartered Financial Analyst), is a member of the CFA Institute and the CFA Society of Seattle, and also a CAIA (Chartered Alternative Investment Analyst) charter holder.

**Thomas C. Foster, CFA**

Director, Pension & Trust Investments
Pinnacle West Capital Corporation

Mr. Foster holds the position of Director, Pension and Trust Investments at Pinnacle West Capital Corporation in Phoenix, Arizona. In that role he manages the investment of over \$6 billion in pension, post-retirement medical, nuclear decommissioning, foundation, coal reclamation and 401(k) assets. He is the company's primary contact for relationships with investment managers, investment consultants and trustees.

Mr. Foster has held this position for six years, and previously performed the same function for 20 years with the Berkshire Hathaway subsidiary MidAmerican Energy Company based in Des Moines, Iowa. Prior to that Mr. Foster taught investments, finance and economics at the University of Iowa and Iowa Wesleyan College and also served on the staff of the public utility regulatory commission in the state of Iowa.

Mr. Foster is a CFA charter holder, a former president of the CFA Society of Iowa, a former chairman of the board of the CFA Society of Iowa, a current member of the Phoenix CFA Society and a member of the American Economic Association. Mr. Foster holds a Bachelor's degree in Finance and a Master's degree in Economics.



Ramon Gonzalez, CFA

Vice President
Wilshire Associates

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



Michael Gillis*

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

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

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

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



Maureen Kennedy Hays

Managing Director, Consultant Relations
Principal Global Investors

Maureen is a managing director, consultant relations at Principal Global Investors. She most recently was at AXA-IM as Director of Consultant Relations and prior to that was the director of institutional sales for the E&F channel at AXA Rosenberg. Previously, she spent over 5 years as a senior member of MSIM's Global Consultant Relations team. She also held positions in sales, and as a product specialist and senior relationship manager while at Scudder, Stevens & Clark. Maureen began her career as an investment analyst at GTE Investment Management and then as a senior investment specialist at Buck Consultants. She earned her bachelor's degree from Trinity College and an MBA from University of Connecticut. Maureen is a Registered Representative of Principal Securities, Inc. and has passed the FINRA Series 7 and 63 examinations.

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**Dick Hoag**

Senior Institutional Sales and Client Service
Sawgrass Asset Management, LLC

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

**Dale Kindregan***

Executive Director, Endowments and Foundations
UBS Asset Management (Americas)

Dale joined UBS Asset Management in January 2017 as a Client Advisor covering endowments and foundations (E&F). In this role, she helps to strategically develop new business relationships with universities, foundations and other non-profit organizations.

Prior to joining UBS Asset Management, Dale was Director, Institutional Advisory Services at Principal Global Investors for four years, where she was responsible for selling institutional strategies to endowments, foundations and non-profit healthcare organizations across the U.S. Prior to this, Dale was Head of Endowment and Foundation Channel in the Institutional Sales Group at PineBridge Investments (formerly AIG Investments) from 2005 to 2011. From 2001 to 2005, she was Endowment & Foundation Relationship Manager at Russell Investments, where she developed and implemented Russell's OCIO new business strategy within the E&F sector nationally.

Dale held a Vice President position at U.S. Trust Company from 1997 to 2001 and Glenmede Trust Company from 1991 to 1997 selling various investment strategies to E&F and other institutional investors. She started her career as a Marketing Representative at Del-Vest, Inc.-Bank of Delaware from 1986 to 1991.

Dale has been a Board Member and Chair of the Gala Event Committee for the Jubilee Center of Hoboken Children's Educational Program since 2008. She is a member of AIMSE and 100 Women in Finance and is a prior Board Member of the Hepatitis B Foundation.

**Kent Knudsen, CFA**

Senior Vice President, Alternative Investments
Mutual of Omaha

Kent Knudsen is Senior Vice President of Investments for Mutual of Omaha. Prior to joining the Company in April 1996, Mr. Knudsen spent 13 years sourcing, analyzing, structuring, and negotiating privately placed debt and equity securities for The Northwestern Mutual Life Insurance Company. At Mutual of Omaha, his responsibilities now include



contributing to the growth and profitability of corporate assets including private equity, high yield bonds and preferred stock. He is a Chartered Financial Analyst and has a Bachelor of Science–Mathematics degree from Lawrence University in Appleton, Wisconsin and a Masters in Business Administration degree from the University of Ohio in Athens, Ohio.



Larry Krummen, CFA

Chief Investment Officer

Missouri Department of Transportation and Highway Patrol Employees' Retirement System

Larry is the Chief Investment Officer for the Missouri Department of Transportation and Highway Patrol Employees' Retirement System (MPERS), where he is responsible for the management and oversight of the system's \$2 billion investment portfolio. Since joining MPERS in 2003, he has restructured the portfolio into a diversified and sophisticated investment program with investments across global equities, fixed income, hedge funds, private equity, and real assets. His efforts to improve the system's performance were recently recognized by CIO magazine, who awarded MPERS with the 2016 CIO Industry Innovation Award for public funds under \$15 billion in assets.

Prior to 2003, Larry was the Director of Investments for the Missouri State Treasurer's Office, managing a \$3.0 billion fixed income portfolio. Larry graduated with Honors from the University of Missouri–Columbia, receiving a dual major in the areas of Finance and Banking, and Real Estate.



Christopher Lakatos, CFP, AIF

Principal & Senior Consultant

Cornerstone Institutional Investors, Inc.

Christopher has worked with Cornerstone since March 2004 and is a Principal of the Company.

As a Senior Consultant, his responsibilities include Strategic Planning and creating best-fit solutions for individual and institutional clients, in areas of retirement planning, executive benefits, insurance analysis, charitable giving programs and personal and institutional wealth management. He effectively works through a prudent investment process to ensure that the highest level of fiduciary standards and insulation is met.



Brian K. Lee*

Director of Marketing & Client Service

Oberweis Asset Management, Inc.

Brian joined Oberweis Asset Management in April of 2002 to establish and lead the firm's institutional marketing and client service efforts. Brian earned an MBA from Loyola Marymount University and a BA in Finance from Loyola Marymount University. Previously, he was employed by Delaware Investments/Lincoln Financial Distributors, where he served as a Director of Marketing. Prior to that, he worked for Wilshire Associates in both marketing and client service roles.

**Kevin M. Leonard**

Director of Public Fund Consulting
NEPC

Kevin joined NEPC in 2007 and his career in the financial services industry began in 1991 and the investment consulting industry in 1994. His consulting responsibilities and background include servicing public pension plans, Taft-Hartley pension funds, hospital, endowments, and foundations. Kevin is the team leader for the NEPC Public Fund Consulting Practice and is also a member of NEPC's Due Diligence Committee and Large Cap Equity Research Advisory Committee.

Prior to joining NEPC, Kevin was a Vice President/Partner at Segal Advisors. Prior to working at Segal Advisors, he was a Consultant at The Hannah Consulting Group, and worked at State Street Bank and Trust Company.

Kevin received his B.A. in Business Management from Assumption College. He served on the Board of Directors for the Massachusetts Public Pension Forum and is a frequent speaker at educational conferences and association seminars. Kevin was recognized as the 2012 Public Plan Consultant of the Year by Money Management Intelligence. Kevin was also a nominee for the same award in 2011.

**Michael P. Manning, CFA, CAIA**

Managing Partner
NEPC

Mike began his investment career in 1993 and joined NEPC in 1997. Mike became President of NEPC, LLC, in 2003 and Managing Partner in April 2011. Mike works with a broad array of clients, covering Taft-Hartley, Public, Corporate, and Endowment/Foundation investment programs. Mike currently serves on NEPC's Alternative Assets Committee. In addition, he is a frequent speaker at national industry conferences and seminars.

During his tenure at NEPC, Mike has co-authored many of the firm's research reports. Some of the topics covered are market neutral hedge funds, high yield bonds, global fixed income, and mid-cap equities. In addition, he is a frequent speaker at national industry conferences and seminars. Recent speeches have dealt with conflicts of interest in Investment Consulting, uses of portable alpha, and asset allocation strategies.

Prior to joining NEPC, Mike worked in a money management division of Prudential Insurance Company of America focusing on private debt investing. Prior to Prudential, Mike worked at Putnam Investments and Fidelity Investments.

Mike earned a M.B.A., with honors, from the University of Chicago Graduate School of Business, with concentrations in Finance and Accounting. At University of Chicago, he served as a member of the school's Admission's Committee. He received his B.A. from the University of Notre Dame. Mike is a member of the Boston Security Analyst Society and the CFA Institute. Mike is a CFA charter holder and he also became a Chartered Alternative Investment Analyst (CAIA) designee in 2005.



Timothy Matson

Chief Investment Officer
Reinsurance Group of America, Inc.

Timothy Matson is Executive Vice President, Chief Investment Officer for Reinsurance Group of America, Incorporated (RGA). He is responsible for directing RGA's investment policy and strategy, and for managing the company's global asset portfolio. He is a member of RGA's Executive Committee.

Tim has more than two decades of investment experience with insurance general accounts, mutual funds, and third-party separate accounts across a wide range of asset classes. Before joining RGA in August 2014, he held investment management positions with Aetna and ING in both the U.S. and Asia. Most recently, he was the Chief Investment Officer of Cathay Conning Asset Management (CCAM), a joint venture based in Hong Kong.

He received a Bachelor of Arts (B.A.) degree from Cornell University's College of Arts and Sciences, and an M.B.A. from Cornell University's S.C. Johnson Graduate School of Management. He is a Chartered Financial Analyst (CFA).



Ken Menezes, CFA

Managing Director, Asset Management
American Airlines, Inc.

Ken is the Managing Director of Asset Management within the Treasury department of American Airlines. His group is responsible for managing the investment activity of the various retirement and health/welfare plans, providing oversight of the Company's short term investments and surety bond portfolio, monitoring financial risk including interest rate risk, FX risk and commodity risk and providing analytical support for the Treasury department. Prior to this role, Ken was part of the Corporate Finance team with responsibility for managing the Company's liquidity and capital markets transactions. Ken has a Masters in Business Administration degree from Southern Methodist University and is also a CFA® charter holder.



Matt Mullarkey, CFA

Head of Advisory, Americas
Aksia

Matt is Head of Advisory, Americas, where he oversees a team of advisory professionals and works with North American-based institutions on their hedge fund programs.

Prior to joining Aksia in May 2011 as a Senior Portfolio Advisor, Matt was an Investment Officer and portfolio manager for the Absolute Return Strategies Group of the New York State Common Retirement Fund, the third largest public plan in the United States. He managed a \$1.5 billion long/short equity portfolio, as part of the pension fund's \$4.3 billion hedge fund program. Matt was an integral part of the team that restructured the pension's hedge fund program, transforming it from a \$5.5 billion fund of hedge funds focused strategy, to a concentrated direct investment portfolio. The pension fund was recognized by Institutional Investor as "Large Plan of the Year" at its 2010 Hedge Fund Industry Awards.

Prior to working at the New York State Common Retirement Fund, Matt had an active career in public service, where he was a senior advisor to government officials at the city, state and federal levels. He was a Deputy

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Chief of Staff for the New York City Council, an Assistant Comptroller for the New York State Comptroller's Office, and Chief of Staff to a Congressman. Matt graduated in 1993 from The State University of New York at Albany with a B.A. in History and completed a Master of Urban Planning from New York University, Wagner School in 1998. He is a CFA Charterholder.



Noel O'Neill

Head of Global Investment Research
Cambridge Associates

Noel is the Head of Global Investment Research and a Managing Director at Cambridge Associates. In his role, Noel oversees 150 professionals dedicated to evaluating institutional quality investment managers as well as researching and publishing a wide range of reports addressing capital markets themes and trends. He is responsible for ensuring close alignment between our investment manager ideas and the firm's capital market and asset allocation views. As Head of Global Investment Research, Noel drives collaboration among the leaders of our public growth, private growth, hedge funds, real assets, investment grade bonds, and market research teams to set the strategic direction for all of the firm's research efforts. Noel is also a member of the Private Client Practice at Cambridge Associates. He has worked with private clients, endowments, and pension funds based in the U.S., Europe, and the Middle East. Noel's perspective as an investor helps to ensure that the needs of our clients remain at the forefront of our research efforts.

Prior to joining Cambridge Associates in 1995, Noel was a Manager at Bain & Company, Inc. At Bain, Noel led strategy and operational change assignments for multinational corporations in the U.S., Europe, and Asia. Prior to attending graduate school, Noel was a Mechanical Engineer with General Electric Power Systems division. Noel managed gas turbine and combined cycle power plant construction and commissioning projects in the Middle East, North Africa, Venezuela, Indonesia, and Norway.



Tony O'Toole

Chief Financial & Investment Officer
Truth Initiative

Anthony T. O'Toole is the Chief Financial and Investment Officer at Truth Initiative. In this role, he oversees the organization's annual operating budget and its long-term investments working hand-in-hand with the Board's treasurer and Investment Committee to ensure that Truth Initiative has the fiscal health to make this the generation that ends tobacco use.

Prior to joining Truth Initiative, Tony's skills and diligence benefited Columbia University, where he served as associate vice president for Financial Services and Systems at the Health Sciences Division. This was a far-reaching position, involving not just oversight of the division's financial activities, but also managing the university's affiliations with New York-Presbyterian Hospital and Harlem Hospital Center.

He was previously an audit manager with KPMG Peat Marwick, one of the nation's acclaimed "Big Four" accounting firms.

Sound financial management and budget oversight that ensures long-term sustainability is Tony O'Toole's stock in trade. The effort to bring about America's first tobacco-free generation is stronger because he practices those skills at Truth Initiative.



Carolyn Patton*, CFA

Managing Director, Global Client Group
Deutsche Asset Management

Carolyn Patton, CFA is Managing Director, Global Client Group at Deutsche Asset Management. She joined the Company in 2014 with 22 years of previous industry experience. Prior to joining, Carolyn was Executive Managing Director, Principal leading the global distribution team at Turner Investments. Previously, she was Global Head of Consultant Relations at Janus Capital Group. Before, she was a Managing Director at Morgan Stanley Investment Management and worked at Delaware Investments. Carolyn started her career at SEI Investments. She holds the Series 24, 7, 6, and 63 Licenses. Carolyn received her BA in Economics from University of Virginia and is a CFA Charterholder.



Darrel J. Pfeifauf

Vice President, Research
Summit Strategies Group

Darrel is a Vice President in the Manager Research group at Summit Strategies Group, primarily responsible for hedge fund due diligence, manager selection, and monitoring. Previously, Darrel served as an Investment Analyst for Washington University Investment Management Company. His role covered capital market and manager research across all asset classes at the Endowment. Before joining Washington University, Darrel served as a Trading Associate for Bridgewater Associates, where he focused on Emerging Market Debt. Darrel received his BSBA in Finance and Economics from the University of Tulsa and his MBA from Washington University's John M. Olin School of Business.



Larry Pokora*

Global Director of Investor Relations & Marketing
LibreMax Capital

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. Mr. Pokora was a Senior Vice President at Chartwell Investment Partners and 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.

Larry is very proud that he served on the AIMSE board for seven years as well as serving as President of AIMSE in 2008–2009. He received his Associate's Degree in Computer Science from Community College of Allegheny County in 1982.

**Chris Rae**

Founder & Managing Director
Elevation Marketing Advisory

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

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

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

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

**David Sancewich**

Managing Director
Pension Consulting Alliance

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

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

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

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



Luke Schlafly, CFA

Senior Vice President, Head of Insurance Business Development, Americas
PineBridge Investments

Mr. Schlafly joined PineBridge in 2016 and leads the Americas insurance business, with a focus on providing strategic investment solutions to a broad range of insurance companies. He was previously a Vice President within Business Development at Deutsche Asset Management, where he was responsible for establishing new relationships and advising on a full range of asset classes to the firm's insurance sector clients in the US

and Canada. Mr. Schlafly holds a BS in Finance from Boston College's Carroll School of Management. He is also a CFA charterholder.



Evan Scussel, CFA, CAIA

Head of Equity Investments
AndCo Consulting

Evan is the Head of Equity Investments at AndCo. Evan serves client needs by conducting investment manager due diligence within most areas of the domestic equity space.

Evan has over 15 years of investment experience covering many areas of investment oversight and due diligence, including fund accounting, 401(k) plan management, record keeping, competitive analysis, manager selection, and investment consulting. Prior to joining AndCo, Evan was a Senior Associate with Mercer Investment Consulting, based in Chicago. At Mercer, Evan researched both U.S. and International equity and fixed income strategies and at various times held the titles of U.S. Head of Core Equity and Global Head of Convertible and Municipal Bonds. Evan held previous positions at Aeltus Investment Management, Aetna Financial Services, Cigna Retirement, Prudential Retirement, and Securities, Software and Consulting (SS&C).



Joseph D. Taiber, CFA

Managing Partner
Taiber Kosmala & Associates, LLC

Joe is a co-founder and Managing Partner of Taiber Kosmala & Associates, an employee owned national investment consulting firm that advises a national client base of non-profit organizations, plan sponsors, and investment advisory firms representing approximately \$5.5b in assets. As a Managing Partner and Investment Committee Chairman, Joe oversees the firm's strategic business initiatives and is involved daily in the firm's

investment processes touching all aspects of client investment programs and services including manager diligence, asset allocation, and capital market research.

Joe has been in the investment consulting industry for over 19 years during which time he has operated in various senior level consulting and research roles. Prior to founding Taiber Kosmala & Associates, Joe was the Executive Vice President and Director of Alternative Investment Research at Lowery Asset Consulting and worked as a Senior Investment Consultant at DiMeo Schneider & Associates, LLC.

Joe is a graduate of the University of Iowa with a bachelor's degree in finance and has been a CFA charterholder since 2007. Prior to becoming a CFA charterholder, Joe held the Certified Investment Management Analyst designation (CIMA®) and the Series 7 certification. Joe has been quoted in various national media publications, featured on television, and has appeared at various industry conferences throughout his career and is a member of the CFA Institute and CFA Society of Chicago.

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Joe Thomas, CFA

Director, Investments
BJC Healthcare

In 2007, Joe joined BJC HealthCare, a nonprofit health care organization that includes 15 hospitals and multiple community health locations. The investment team spans traditional and alternative investments for the benefit of pension and endowment portfolios. Prior to BJC, he worked in capital markets and treasury functions at Deutsche Financial Services, GE Capital, and Flagstone Securities. Joe has degrees from St. Louis University and is a CFA charterholder.



Dr. Gio Valiante

Head Performance Coach
Point72

Dr. Gio Valiante is the head performance coach for Point72. Prior to joining the Firm, he earned a Ph.D. from Emory University before becoming a full Professor at Rollins College. He is the author of two best-selling books on sports performance and has served as the mental game consultant to golf's best players, including U.S. Open Champion and Olympic Gold Medalist Justin Rose, Players Champion and Olympic Bronze Medalist Matt Kuchar, and Ryder Cup captain Davis Love III. He has been named: Sports Psychologist of the Year by The Golf Channel; Top 40 Under 40 to Influence the Game of Golf by *Golf Magazine*; and #2 Sports Psychologist in the World by *Golf Digest*.

He has been featured in *The Financial Times*, *The New York Times*, *Good Morning America*, *Sports Illustrated*, and CNBC and ESPN. In addition to providing coaching to athletes, Dr. Valiante provides coaching to business leaders and other high achievers in the area of ultimate human performance. He can be seen every Monday morning on Golf Channel's *Morning Drive*.



Holly Verdeyen*

Director, Defined Contribution Investments
Russell Investments

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

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



J. Gibson Watson III, CIMA®

Industry Consultant and Group President Emeritus
Envestnet Asset Management, Inc.

Mr. Watson provides consulting services to the wealth management industry and to Envestnet Asset Management, Inc. (NYSE: ENV) as Group President Emeritus, Envestnet | Prima. In this capacity, he provides Envestnet with strategy formulation and implementation services for their CIO Support Services including modular research, due diligence and advice on separately managed accounts, mutual funds, ETFs and alternative investments, as well as guidance on asset allocation strategies and models and portfolio construction services. Previously, Mr. Watson had served as Vice Chairman, Envestnet with responsibilities for the firm's Envestnet | PMC division (the SEC Registered Investment Advisor) and for driving growth for the subsidiary, Envestnet | Retirement Solutions, LLC (ERS). Mr. Watson also served on Envestnet | PMC's Investment Committee and the ERS Investment Committee, and chaired the ERS Business Partners Acceptance Committee. Prior to those roles, Mr. Watson had served as Group President of Envestnet | Prima following the successful acquisition of Prima Capital in April 2012. In that role, he coordinated the integration of Prima's research, due diligence, advice, managed portfolios and web-based technologies into Envestnet | PMC and Envestnet's Advisor Suite.

Mr. Watson founded Prima Capital at end of year 1999 and served as the company's CEO and President. Prima had grown to become a leading provider of manager research, due diligence, and advice on separately managed accounts, mutual funds, ETFs and alternative investments to banks and trusts, regional broker-dealers, family offices, and high-end financial advisors. Prima also managed innovative risk-based and target date open-architecture multi-asset class, multi-manager portfolio strategies for clients and 401(k) plans where they served as both an outsourced 3(21) Fiduciary Advisor and a 3(38) Investment Manager. Prima delivered all of their wealth management and retirement solutions through empowering customized versions of their primary web-application, PrimaGuide™ including the first generation of the Matrix Retire Tool(k)it™.

Before founding Prima, Mr. Watson served as National Managing Director of the Investment Advisory Services practice for KPMG LLP where he and his team developed the asset allocation, long-only and alternative manager research and reporting center which supported 400 KPMG financial advisors under his leadership. He was also a member of the Investment Committee for KPMG Investment Advisors. Prior to his work there, he was Senior Vice President and Managing Director for Private Client Services at Portfolio Management Consultants (PMC). Previous to those roles, Mr. Watson served as Vice President of the Wealth Management division and the Denver Executive Financial Counseling office for Asset Management Group (AMG), now AMG National Trust Bank. In addition to managing and growing the two largest profit centers at AMG, Mr. Watson also advised ultra-high net worth families and C-Level corporate executives in all areas of personal finance and investments.

He is active in the industry as a member of the Investment Management Consultants Association (IMCA) Standards of Practice Committee, and he has earned the Association's CIMA® designation through The Wharton School. Mr. Watson is a regular columnist for ThinkAdvisor, and is regularly quoted in industry publications, including Investment Advisor, InvestmentNews, and On Wall Street magazines. Mr. Watson also created the industry's Annual SMA Awards program with Investment Advisor magazine in 2003 and that program continues to honor top quality separate account managers today.

He also served on the Board of Trustees of Dividend Capital's DCA Total Return Fund, a closed-end mutual fund, for five years from 2006 through 2011. During this period, which spanned the 2007-2008 Financial Crisis, the Board was actively involved in consolidating two real estate income funds, directing, selecting and hiring a quality sub-advisor to manage the fund's liquid assets enabling participation in a broad market rally

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in 2009, and finally oversaw the adoption of the fund's assets and management contract by another mutual fund group. Mr. Watson serves on the Advisory Boards for the Johnson Financial Group, a multi-family office, and for Alpha Capital Management Group, an independent RIA firm. He is active in the Colorado business and philanthropic communities as he is a member of the Board of Directors for the Economic Club of Colorado, he helped found the Denver Chapter of Golfers Against Cancer in 2009 remaining active in fund raising for local cancer research for the organization, and he is actively involved with the Fellowship of Christian Athletes.

Mr. Watson is a graduate of Lafayette College, and earned his MA and MBA degrees from Wake Forest University where he was named a Charles H. Babcock Scholar for academic performance in business school.



Susanne Wei, CFA

Senior Associate
Cliffwater

Susanne Wei is a Senior Associate of Cliffwater LLC and a member of the hedge fund research team. Susanne is responsible for manager selection and due diligence on Global Macro and Managed Futures strategies. Prior to joining Cliffwater, Susanne was a research analyst at Bank of America Merrill Lynch, where she was responsible for manager due diligence for the hedge fund platform.

She earned a BS in Business Administration with a concentration in Finance from Boston College. Susanne holds the Chartered Financial Analyst® designation.



Bryon Willy, CFA

Principal
Mercer

Bryon Willy is a Principal in the manager research group of Mercer's investment consulting business in Chicago.

Bryon works in the Fixed Income Boutique as Head of North American research. He is a member of Mercer's US Manager Ratings Review Committee, Global Fixed Income Manager Ratings Review Committee, LDI Committee, and Manager Discretionary Committee.

Bryon joined Mercer from the Federal Home Loan Bank of Chicago where he was Lead Market Risk Analyst. In this position, Bryon was responsible for daily risk analysis on the entire \$90 billion GSE portfolio, including mortgages, CMOs, agency debt, and derivatives. Previously Bryon worked for ABN AMRO in the Capital Markets group and Blue Cross Blue Shield. He brings more than 20 years of experience to Mercer IC.

Bryon earned his MBA in finance at DePaul University and his Bachelor of Science in finance and marketing from Indiana University. He is a CFA charterholder, and a member of the CFA Society of Chicago and the CFA Institute.



Kartini Wilson*

Managing Director, North American Consultant Relations
Man Group

Kartini Wilson is a Managing Director for Man Group and is based New York City. Kartini focuses on institutional business development and sales strategy, as well as managing client and consulting relationships in North America. Upon joining GLG Partners in 2006, which was later acquired by Man Group in 2010, Kartini held numerous roles including marketing and client service for hedge funds and long only strategies. Subsequently, she was responsible for developing and maintaining relationships with Global and North American consultants for Man Group. Kartini earned a Bachelor of Business from the Queensland University of Technology in Australia. She holds FINRA Series 7, 63 and NFA series 3 licenses.



Keith A. Wosneski*

Senior Vice President, Senior Consultant Relations Officer
Acadian Asset Management LLC

Keith joined Acadian's Marketing and Consultant Relations Team in 2012. Prior to Acadian, Keith served as business development director at Mercer. Previous experience includes working with institutional clients in a variety of sales and client service roles at Aurora Investment Management LLC, Northern Trust Global Investments, and Barclays Global Investors. Keith earned an M.B.A. from the University of Notre Dame and holds a B.S.B.A. in international business from the University of Denver.



M. Steve Yoakum

Executive Director
Public School Retirement System of Missouri

M. Steve Yoakum has served as Executive Director of the Public School Retirement System of Missouri (PSRS) and Public Education Employee Retirement System of Missouri (PEERS) since June 1, 2001. Prior to his current service, he worked in the private sector as a managing partner of Rockwood Capital Advisors of St. Louis where he was responsible for overseeing the daily operation and general business activities of the firm. He previously served as PSRS/PEERS Executive Director from 1994-97, Executive Director of the Missouri State Employees' Retirement System (MOSERS) from 1987-94, Director of the Joint Committee on Public Employee Retirement of the Missouri General Assembly (JCPER) from 1985-87 and Assistant Director of the Missouri Local Government Employees' Retirement System (LAGERS) from 1978-85.

Mr. Yoakum is a graduate of the University of Missouri school of business with a degree emphasis in public administration. In addition to his public sector service, he has served as president of the National Association of State Retirement Administrators and the Southern Conference on Teacher Retirement. He was a member of the Board of Directors for the National Institute on Retirement Security, a trustee and member of the investment committee of the Columbia, MO, Police Retirement Board, and a member of the Board of Directors of TALX Corporation in St. Louis for nearly 20 years. He also served as a member of the Board of Directors for the Coalition to Preserve Retirement Security and was Chair of Columbia, MO Mayor's Blue Ribbon Pension Review Task Force.

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CALLAN ASSOCIATES INC.

Contact: Nona Phillips
120 N. LaSalle Street, Suite 2400
Chicago, IL 60602
(312) 346-3536
phillips@callan.com
www.callan.com

Callan

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

EVESTMENT

Contact: Erica Jack
100 Glenridge Point Parkway
Atlanta, GA 30342
(877) 769-2388
ejack@evestment.com
www.evestment.com



eVestment provides a flexible suite of easy-to-use, cloud-based solutions to help the institutional investing community identify and capitalize on global investment trends, better select and monitor investment managers and more successfully enable asset managers to market their funds worldwide. eVestment helps its clients be more strategic, efficient and informed through its leading-edge technology, fantastic client service and by delivering data not only for alternative strategies, but also through the largest, most comprehensive global database of traditional strategies.

The company was founded in 2000 and is headquartered in Atlanta, Georgia with global offices in New York, Toronto, London, Sydney, Edinburgh, Hong Kong and Dubai.

FINSEARCHES

Contact: Gene Dolinsky
15 West 26th Street, 4th Floor
New York, NY 10010
(646) 810-1072
gdolinsky@finsearches.com
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Contact: Naomi Kaufman
535 Boylston Street, 9th Floor
Boston, MA 02116
(617) 424-8080
naomi.kaufman@styleresearch.com
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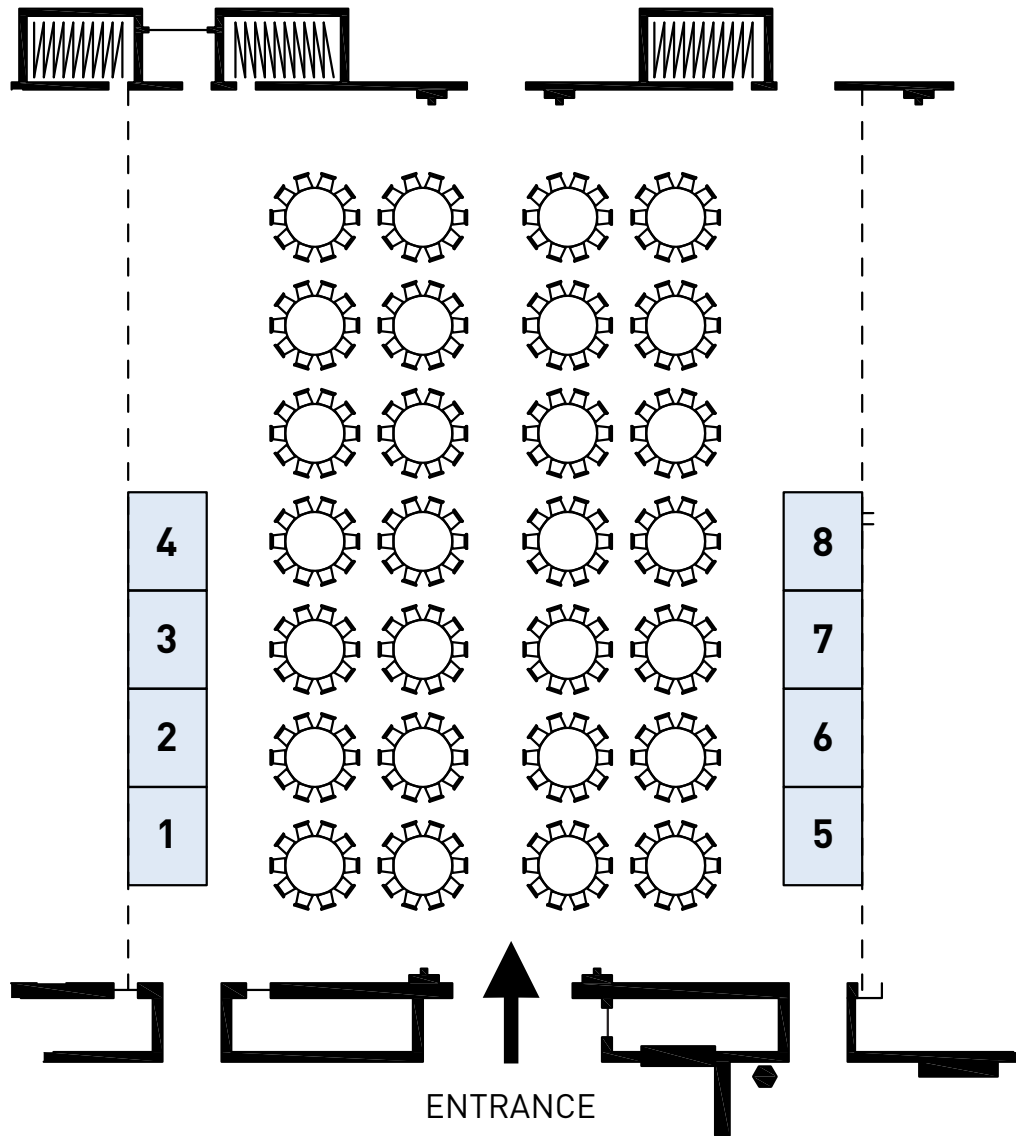
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Booth 3: Callan Associates, Inc.
Booth 4: MandateWire

Booth 5: Standard & Poor's
Money Market Directories
Booth 6: AIMSE Click Leaderboard
Booth 7: Satuit Technologies
Booth 8: FINsearches

CONFERENCE
DESK

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RESORT MAP



1. Lobby
2. Front Desk
3. Bell Desk
4. Concierge Desk/Golf Concierge
5. Car Rental
6. Provisions Retail Market
7. Mavericks Menswear
8. Anna J Boutique
9. Bourbon Steak by Michael Mina

10. Princess Plaza
11. The Plaza Bar
12. Princess Falls *
13. Princess Ballroom & Conference Center
14. Palomino Ballroom & Conference Center
15. La Hacienda by Richard Sandoval
16. Well & Being Spa
17. Hacienda Plaza & Trellis
18. Canyon Lawn

19. Well & Being Salon
20. Casita Pool & Jacuzzi
21. Princess Pool & Bar
22. Ironwood American Kitchen*
23. Cabana Cafe/Princess Pool Bar*/ Princess Pool Overlook
24. Trailblazers Family Adventure Center*
25. Fairmont Fitness Center *
26. Fragrance Garden



Fairmont Gold:

6101 - 6114 | 6201 - 6218
6301 - 6316 | 6401 - 6424

Building B:

1082 - 1118 | 2082 - 2118
3082 - 3115 | 4082 - 4098

Building C:

1119 - 1144 | 2119 - 2144
3119 - 3141

Building D:

1067 - 1081 | 2067 - 2081
3061 - 3081 | 4061 - 4081

Building E:

3038 - 3060 | 4038 - 4060

Building F:

1014 - 1037 | 2006 - 2037
3001 - 3037 | 4001 - 4021

Building G:

1201 - 1220 | 2201 - 2220
3201 - 3220

Sunset Beach Building:

1401 - 1434 | 2401 - 2434
3401 - 3434

Casitas I:

5100 - 5109
5110 - 5121
5122 - 5131
5132 - 5141

Casitas II:

5200 - 5209
5210 - 5221
5222 - 5231
5232 - 5241

Casitas III:

5300 - 5309
5310 - 5321
5322, 24, 26, 28, 30
5332, 34, 36, 38, 40

Casitas IV:

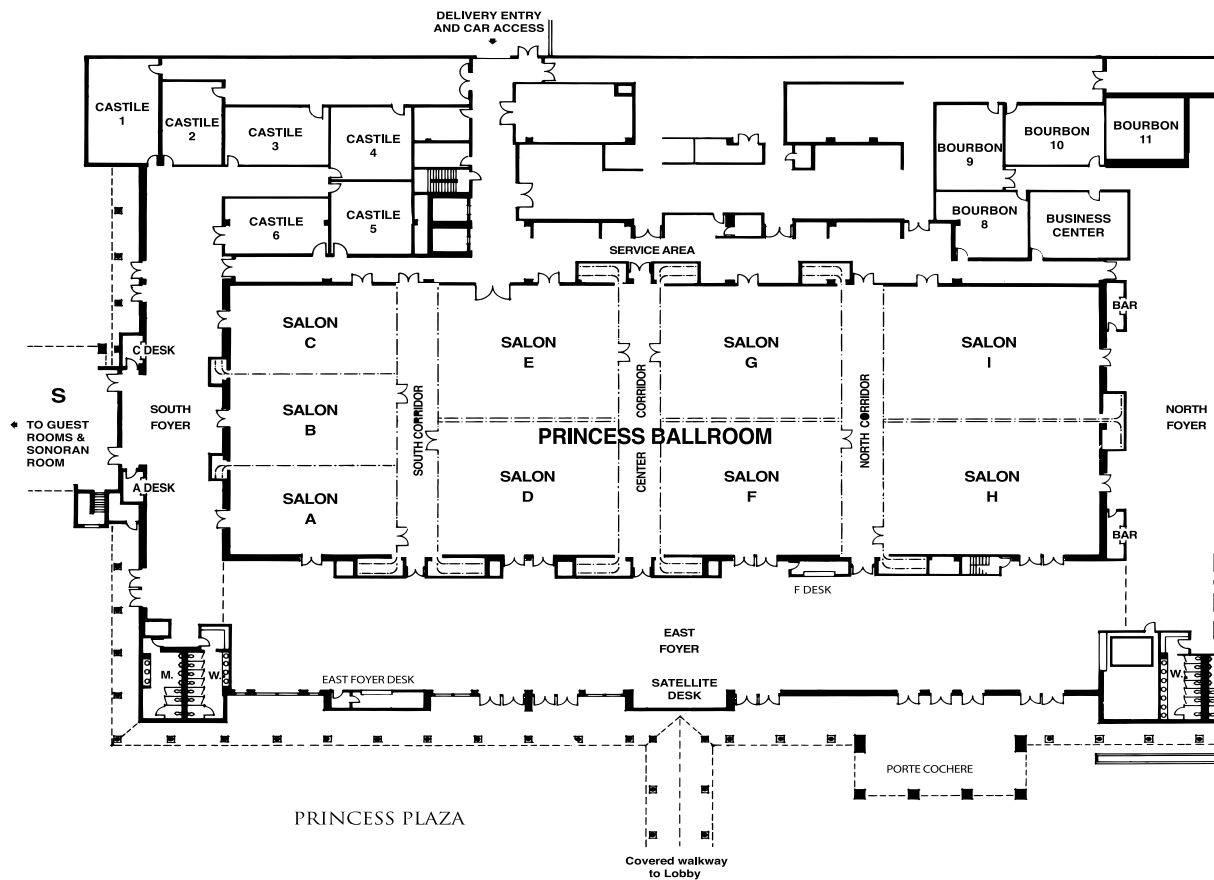
5400 - 5409
5410, 12, 14, 16, 18

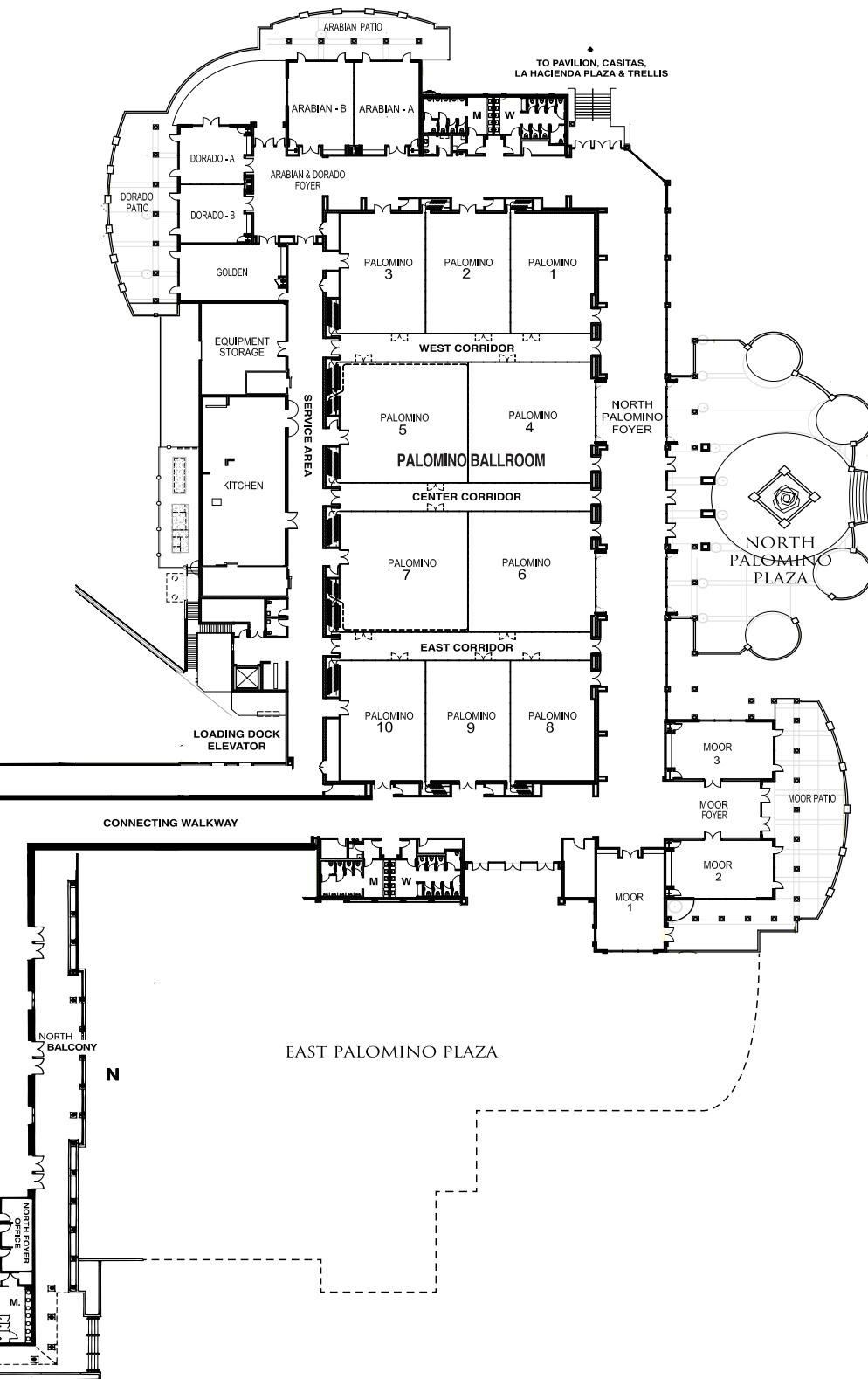
- 27. Ironwood Circle
- 28. Sonoran Splash Pool
- 29. Sport Court & Playground
- 30. Sonoran Landing Pool
- 31. Toro Latin Restaurant & Rum Bar at TPC
(complimentary shuttle at front drive)
- 32. Ironwood Meeting Room*
- 33. Pavilion (seasonal)
- 34. North Palomino Plaza

- 35. Saguaro Boardroom
- 36. East Palomino Plaza
- 37. Sunset Lawn
- 38. Princess Pool Upper East Deck
- 39. Princess Pool Upper West Deck
- 40. Sunset Beach Building
- 41. Sunset Beach Pool
- 42. Copper Canyon Western Town

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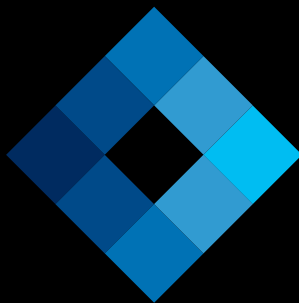


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