

humor THAT WORKS



2018 Fall Conference

October 10-11, 2018

The Westin New York at Times Square
New York, NY

CONFERENCE PROGRAM







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2018 Fall Conference

October 10-11, 2018

The Westin New York at Times Square
New York, NY

schedule AT A GLANCE

Wednesday, October 10, 2018

12:00 – 6:00 pm <i>Broadway Foyer, 3rd Floor</i>	Registration
1:15 – 1:30 pm <i>Broadway Ballroom, 3rd Floor</i>	Welcome Remarks
1:30 – 2:10 pm <i>Broadway Ballroom, 3rd Floor</i>	Veterans Panel: The Art of Relationship Management
2:15 – 3:10 pm <i>Broadway Ballroom, 3rd Floor</i>	Traditional Investments: Latest Trends and Evolving Opportunities
3:15 – 4:00 pm <i>Broadway Ballroom, 3rd Floor</i>	A Rising Wave: Perspective from Young Investors
4:00 – 4:30 pm <i>Gershwin Ballroom, 4th Floor</i>	Networking Break with Exhibitors
4:30 – 5:15 pm <i>Broadway Ballroom, 3rd Floor</i>	Investor Insights, Looking Ahead
5:15 – 6:00 pm <i>Broadway Ballroom, 3rd Floor</i>	CIO Think Tank
6:00 – 7:00 pm <i>Gershwin Ballroom, 4th Floor</i>	Reception
7:00 – 8:30 pm <i>Gershwin Ballroom, 4th Floor</i>	Dinner and Networking

Thursday, October 11, 2018

7:30 am – 5:30 pm <i>Broadway Foyer, 3rd Floor</i>	Registration
7:30 – 8:00 am <i>Gershwin Ballroom, 4th Floor</i>	Networking Breakfast with Exhibitors
8:00 – 8:10 am <i>Broadway Ballroom, 3rd Floor</i>	Welcome Remarks
8:15 – 9:10 am <i>Broadway Ballroom, 3rd Floor</i>	ESG Investing: Moving into the Mainstream
9:15 – 10:00 am <i>Broadway Ballroom, 3rd Floor</i>	Keynote Speaker Andrew Tarvin Humor That Works: How to Be More Productive, Less Stressed, and Happier
10:00 – 10:30 am <i>Gershwin Ballroom, 4th Floor</i>	Networking Break with Exhibitors
10:30 – 11:15 am <i>Broadway Ballroom, 3rd Floor</i>	OCIO Marketplace: Past, Present and Into the Future
11:20 am – 12:10 pm <i>Broadway Ballroom, 3rd Floor</i>	Alternatives and the Road Ahead: Strategies for 2019 and Beyond
12:15 – 1:15 pm <i>Gershwin Ballroom, 4th Floor</i>	Networking Lunch with Exhibitors
1:30 – 2:20 pm <i>Broadway Ballroom, 3rd Floor</i>	Endowments & Foundations: The Path Forward, Adapting to a New Paradigm
2:25 – 3:15 pm <i>Broadway Ballroom, 3rd Floor</i>	The Ever-Changing Landscape of Healthcare Plans
3:15 – 3:45 pm <i>Gershwin Ballroom, 4th Floor</i>	Networking Break with Exhibitors
3:45 – 5:15 pm <i>Broadway Ballroom, 3rd Floor</i>	Consultant Roundtables
5:15 – 5:25 pm <i>Broadway Ballroom, 3rd Floor</i>	Concluding Remarks
5:30 – 7:00 pm <i>Gershwin Ballroom, 4th Floor</i>	Reception

extended SCHEDULE

Wednesday, October 10, 2018

12:00 – 6:00 pm

*Broadway Foyer,
3rd Floor*

Registration

1:15 – 1:30 pm

*Broadway Ballroom,
3rd Floor*

Welcome Remarks

Conference Co-Chairs

Adam Gerentine
Managing Director
Trinity Street Asset Management

Kerra M. Smith
Head of Marketing & Business Development
Private Investment firm

AIMSE President

Christopher J. Paoletta
Managing Director, OCIO
Invesco

1:30 – 2:10 pm

*Broadway Ballroom,
3rd Floor*

Veterans Panel: The Art of Relationship Management

Strong relationships between allocators, consultants and investors are the foundation of our industry. They help clarify common objectives, mediate through periods of difficulty and ensure that all parties are focused on the goal of maximizing outcome for the ultimate beneficiary. Our panel of veterans is composed of professionals from all sides of this multi-faceted relationship: allocator, consultant, sales/consultant relations, each of whom has worked on different sides of our industry during their careers. Please join them as they discuss best practices and the challenges faced by all in an increasingly competitive market.

Moderator:

Paul Foster, CFA
Head of Consultant Relations
The London Company

Speakers:

P. MacKenzie Hurd, CFA
Managing Director, Consultant Relations
Jennison Associates

Geeta Kapadia, CFA
Senior Investment Strategist, Treasury
Yale New Haven Health

Kevin Norton
Director of Investment Management
Archdiocese of New York

<p>2:15 – 3:10 pm</p> <p><i>Broadway Ballroom, 3rd Floor</i></p>	<p>Traditional Investments: Latest Trends and Evolving Opportunities</p> <p>This session will highlight the latest trends and opportunities within the traditional investment world across all client segments. Hear from several of the industry’s leading investment consultants as they describe their clients’ current interests, priorities and plans. How have investors modified their target allocations? Which equities are most attractive? How is fixed income evolving? How can managers communicate most constructively with consultants and clients?</p> <p>Moderator: Sean McCoy Director Artisan Partners, Limited Partnership</p> <p>Speakers: Christopher Cesare Founding Partner, Consultant Rocaton Investment Advisors</p> <p>David Hyman, CFA Partner & US Wealth Manager Solutions Segment Leader Mercer</p> <p>David Sancewich Managing Director Pension Consulting Alliance</p>
<p>3:15 – 4:00 pm</p> <p><i>Broadway Ballroom, 3rd Floor</i></p>	<p>A Rising Wave: Perspective from Young Investors</p> <p>David Mamet, author of Glengarry Glen Ross, once said, “old age and treachery will always beat youth and exuberance.” Well, we disagree! This session provides a dynamic viewpoint from a group of young investors from institutional to intermediary and everything in between. An engaging and fresh perspective, we’ll hear from these rising stars about the both the successes and challenges they’ve faced in a shifting landscape, their views on issues that will affect the investing community for years to come and a range of other topics.</p> <p>Moderator: Bart Marchant Regional Director, Northeast GQG Partners LLC</p> <p>Speakers: Rob Balkema, CFA Portfolio Manager, Multi-Asset Solutions Russell Investments</p> <p>Edward Coward Institutional Consultant Morgan Stanley Graystone</p> <p>Ross Ondrusek, CFA, CFP Senior Investment Research Analyst USAA</p> <p>Caroline Thomas Assistant Vice President Brown Brothers Harriman & Co.</p> <p>J. Andrew Webb, CFA, CPA Director Highland Associates</p>

extended SCHEDULE (CONTINUED)

<p>4:00 – 4:30 pm</p> <p><i>Gershwin Ballroom, 4th Floor</i></p>	<p>Networking Break with Exhibitors</p>
<p>4:30 – 5:15 pm</p> <p><i>Broadway Ballroom, 3rd Floor</i></p>	<p>Investor Insights, Looking Ahead</p> <p>Allocators and industry leaders provide their outlook on emerging trends and opportunities across the global investment landscape. Have trade wars and rising rates changed expected allocations? Will rising commodity prices change their views on EM? Listen to what is on the radar for the next 12 months!</p> <p>Moderators: Jaime Cuadra Director Compass Group, LLC</p> <p>Speakers: A. Bruce Audino Senior Vice President, Senior Manager Researcher Bessemer Trust</p> <p>Tatiana Pohotsky, CFA Senior Investment Officer, Group Leader Global Active Management Bureau of Asset Management, NYC Office of the Comptroller</p> <p>Dennis Santos Vice President, Head of Manager Research Investment Solutions Group - OCIO</p>
<p>5:15 – 6:00 pm</p> <p><i>Broadway Ballroom, 3rd Floor</i></p>	<p>CIO Think Tank</p> <p>Chief Investment Officers stand at the forefront of managing portfolios in the face of changing market dynamics and investing for the long-term in a new paradigm. Whether it be the latest upheaval in emerging markets, the ongoing active/passive discussion or determining optimal asset allocation, the role of the CIO holds great importance in navigating through uncertainty.</p> <p>We're joined by some distinguished CIOs who come from distinctly different institutions with varying investment objectives and risk tolerance. The panel will offer their candid opinions on a variety of topics including, asset allocation, geopolitical issues, income versus growth, inflation/deflation, passive versus active, volatility, liquidity, tail-risk hedging, and much more.</p> <p>Moderator: Tim McAvoy Client & Consultant Relations Coho Partners, Ltd.</p> <p>Speakers: Rick Nelson Principal Syzygy Advisors LLC</p> <p>Matthew Stroud, CFA Senior Director, Global Pensions Marsh & McLennan Companies</p> <p>Charles Van Vleet Assistant Treasurer, Chief Investment Officer Textron Inc.</p>

6:00 – 7:00 pm <i>Gershwin Ballroom, 4th Floor</i>	Reception
7:00 – 8:30 pm <i>Gershwin Ballroom, 4th Floor</i>	Dinner and Networking Enjoy dinner and networking with AIMSE members, investment consultants, and allocators in a relaxed and friendly environment.
Thursday, October 11, 2018	
7:30 am – 5:30 pm <i>Broadway Foyer, 3rd Floor</i>	Registration
7:30 – 8:00 am <i>Gershwin Ballroom, 4th Floor</i>	Networking Breakfast with Exhibitors
8:00 – 8:10 am <i>Broadway Ballroom, 3rd Floor</i>	Welcome Remarks Conference Co-Chairs Adam Gerentine Managing Director Trinity Street Asset Management Kerra M. Smith Head of Marketing & Business Development Private Investment firm
8:15 – 9:10 am <i>Broadway Ballroom, 3rd Floor</i>	ESG Investing: Moving into the Mainstream ESG (environmental, social and governance) matters are rapidly becoming mainstream concerns for investors as there is increasing evidence that ESG considerations can potentially have a material and positive impact on the risk and return of an investment portfolio. These non-financial considerations are now firmly in the spotlight with different applications for different investors, evolving from more traditional responsible investing to risk mitigation and even alpha generation today. In this panel discussion, we will explore how ESG investment thinking continues to evolve among investors, asset managers, and consultants in the U.S. Moderator: Scott Howe, CAIA Senior Vice President, Business Development Candriam Investors Group Speakers: Christina Alfandary Managing Director, ESG & Sustainable Investments GAMCO Asset Management Deborah Christie, CFA Managing Director Cambridge Associates Dr. Matthew Sherwood Director, Public Markets Investments MMBB Financial Services

extended SCHEDULE (CONTINUED)

9:15 – 10:00 am <i>Broadway Ballroom, 3rd Floor</i>	Keynote Speaker Andrew Tarvin Humor That Works: How to Be More Productive, Less Stressed, and Happier <p>83% of Americans are stressed out at work and 55% are unsatisfied with their jobs. The impact? Close to a trillion dollars in lost productivity and increased costs. Luckily humor is here to help. People who use humor are more productive, less stressed, and happier. This interactive and experiential program will teach you what humor at work means, why it is desperately needed, and how to use humor to create a positive work culture, increase team productivity, manage stress, and have more fun.</p>
10:00 – 10:30 am <i>Gershwin Ballroom, 4th Floor</i>	Networking Break with Exhibitors
10:30 – 11:15 am <i>Broadway Ballroom, 3rd Floor</i>	OCIO Marketplace: Past, Present and Into the Future <p>The panel will address the development of the OCIO marketplace, discussing the past, the present and looking into the future of the OCIO business and how this will impact investment management firms as well as institutional clients. Panelists will also address the best way to work with their respective firms.</p> <p>Moderator: Peter Crivelli Senior Vice President, Institutional Sales Carillon Tower Advisers</p> <p>Speakers: Benjamin Hall, CAIA Director, Alpha Research Segal Marco Advisors</p> <p>Ryan Lennie, CFA Managing Director Wilshire Associates</p> <p>Larry Vasquez, CFA Partner & Senior Portfolio Manager, Equities Mercer</p>
11:20 am – 12:10 pm <i>Broadway Ballroom, 3rd Floor</i>	Alternatives and the Road Ahead: Strategies for 2019 and Beyond <p>Alternatives investing continues to evolve and grow. In light of recent returns and market events year to date, hear from different types of market leaders how active they have been, what strategies are appealing and why. With the continued increase in large pension allocations, learn what their views on optimal AUM size are and at what size or growth trajectory do endowments and foundations consider a fund to be an asset gatherer. Hear from a panel of leading institutions which fund characteristics they are attracted to now, and how they are positioning themselves for 2019 and beyond.</p> <p>Moderator: J. Douglas Newsome, CFA Managing Director, Director of Research Perkins Fund Marketing</p> <p>Speakers: Paul Benjamin, CFA Director of Investments Alcoa</p> <p>Andrew Eberhart Chief Investment Officer Heinz Family Office</p> <p>Anthony S. Waskiewicz, Jr., CFA Chief Investment Officer Mercy Health</p>

<p>12:15 – 1:15 pm</p> <p><i>Gershwin Ballroom, 4th Floor</i></p>	<p>Networking Lunch with Exhibitors</p> <p>Take advantage of this opportunity to network with your peers and learn how they are executing sales and service best practices.</p>
<p>1:30 – 2:20 pm</p> <p><i>Broadway Ballroom, 3rd Floor</i></p>	<p>Endowments & Foundations: The Path Forward, Adapting to a New Paradigm</p> <p>After 10 years...yes, 10 years of capital market and economic growth, how will Endowment and Foundation CIO's chart the path forward? Hear from our panel of E&F experts as they discuss the challenges they face navigating today's markets given the backdrop of a decade long bull market. Topics to be addressed will include:</p> <ul style="list-style-type: none"> • Role of Hedge Funds and Traditional long only managers • Private Markets: Dry powder and credit quality concerns • Market and Non-Market Risks • Demand for Impact or Sustainable Investments • Besides returns, what is most valued from managers? <p>Moderator: Rachel S.L. Minard Founder & Chief Executive Officer Minard Capital LLC</p> <p>Speakers: Mary Cernilli Managing Director, Absolute Return and Credit Strategies (Former) Emory University</p> <p>Al Kim Director of Investments Helmsley Charitable Trust</p> <p>Andrew Parrillo Founder Newport Capital Advisers</p> <p>Bei Saville, CFA, CAIA Senior Endowments & Foundations Chief Investment Officer Northern Trust Corporation</p>
<p>2:25 – 3:15 pm</p> <p><i>Broadway Ballroom, 3rd Floor</i></p>	<p>The Ever-Changing Landscape of Healthcare Plans</p> <p>With the landscape constantly evolving in healthcare and providers trying to juggle an uncertain rule book out of Washington DC, we will dive into what areas currently are the most concerning for them. Then we will address where they see opportunity. Finally, we will take a look at how best to cover their organizations and what to avoid.</p> <p>Moderator: Lewis Del Ponte Vice President, Institutional Sales Ranger Capital</p> <p>Speakers: Ryan Bailey, CFA, FRM, CAIA, CMT Head of Investments Children's Health System of Texas</p> <p>Susan Slocum Chief Investment Officer & Treasurer Children's Minnesota</p> <p>Paul Staab, CFA Manager, Investments Catholic Health Initiatives</p>

<p>3:15 – 3:45 pm <i>Gershwin Ballroom, 4th Floor</i></p>	<p>Networking Break with Exhibitors</p>
<p>3:45 – 5:15 pm <i>Broadway Ballroom, 3rd Floor</i></p>	<p>Consultant Roundtables</p> <p>One of the most highly anticipated sessions of the Fall Conference, the consultant roundtables give you the opportunity to interact directly with a mix of traditional, alternative and OCIO consulting professionals. Enjoy direct dialogue with experienced individuals as they provide organizational updates, discuss strategic research themes, and share search activity specific to each firm's unique client base. Understand how to navigate each organization, as well as their preferred communication practices to improve the quality of future interactions. AIMSE is dedicated to keeping each rotation intimate to encourage candid conversations. No formality — just you and your fellow marketers with an open forum and opportunity to increase your effectiveness as a marketer and your company's chances to become a valued partner.</p> <p>Moderator: Tasleem Jamal, CFA Vice President, Head of Marketing & Client Services Sprucegrove Investment Management Ltd.</p> <p>Speakers: Cheryl Barker Senior Research Liaison FEG Investment Advisors</p> <p>Ryan Dembinsky, CFA Senior Research Analyst, Fixed Income Russell Investments</p> <p>Kevin Machiz, CFA, FRM Vice President, Fixed Income Investment Consultant Callan LLC</p> <p>Daniel Melloh, CAIA Director, Manager Research Investment Performance Services, LLC</p> <p>Nolan O'Neill, CFA Director, Manager Research Pavilion Advisory Group</p> <p>Francois Otieno Director of Fixed Income Segal Marco Advisors</p> <p>Michael Perdsock Research Director of Traditional Investments & Senior Consultant Gavion LLC</p>

5:15 – 5:25 pm <i>Broadway Ballroom, 3rd Floor</i>	Concluding Remarks Conference Co-Chairs Adam Gerentine Managing Director Trinity Street Asset Management Kerra M. Smith Head of Marketing & Business Development Private Investment firm AIMSE President Christopher J. Paoletta Managing Director, OCIO Invesco
5:30 – 7:00 pm <i>Gershwin Ballroom, 4th Floor</i>	Reception

NOTE: The preliminary program is subject to change, including speakers listed.
Please check https://www.aimse.org/engage/fall_conference.cfm frequently for updates.



Callan LLC

Callan's Institutional Consulting Group (ICG) empowers investment management organizations with the research, education and analytical services necessary to succeed in an evolving and extremely competitive environment. Callan assists investment management organizations in three areas:

1. Market Trend Analysis
2. Portfolio Analytics
3. Institutional Investment Education

Callan

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2018 AIMSE FALL CONFERENCE *biographies*

Conference Co-Chairs



Adam Gerentine

Managing Director
Trinity Street Asset Management

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



Kerra M. Smith

Head of Marketing & Business
Development
Private Investment firm

Kerra (Marmelstein) Smith has 16 years of experience in investment management with three years in investment consulting and 13 years of hedge fund industry experience. Kerra attended Bowdoin College, where she graduated with an AB in Mathematics and Economics. After Bowdoin, she worked as a Consulting Associate at Cambridge Associates in Boston. In 2005, Kerra joined JP Morgan Alternative Asset Management focusing on Client Solutions and was promoted to Vice President. Following JP Morgan, Kerra developed new business and managed existing relationships for several hedge fund firms, including Gotham Asset Management, Hudson Bay Capital, and most recently, Forester Capital. She is a member of 100 Women in Finance and serves as a board member of the Association of Investment Management Sales Executives (AIMSE).

Speakers, Moderators & Conference Committee

**Indicates Fall Conference Committee Member*



Christina Alfandary

Managing Director, ESG & Sustainable
Investments
GAMCO Asset Management

Christina L. Alfandary is Managing Director, Environmental, Social & Governance (ESG) and Sustainable Investments at GAMCO Asset Management, the institutional affiliate of Gabelli Asset Management Company. At GAMCO, Ms. Alfandary oversees the company's expansion of its ESG integration efforts and ESG investing capabilities. Ms. Alfandary has over twenty-five years of experience in the investment business. Prior to re-joining GAMCO, she served as Senior Managing Director, Co-Head of Nikko Asset Management Americas, Inc., until 2015 working as part of a senior management team as the firm underwent a major restructuring resulting in its growth from \$50 billion to \$150 billion AUM. While there she initiated North American business development and later managed the US business. She was also instrumental in a US product launch of an innovative impact investing Green Bond product developed in collaboration with the World Bank. Prior to Nikko AM, she was a Vice President at GAMCO Investors from 2000 to 2005 where she worked with institutional and high net worth clients. Her investment experience includes working at Morgan Stanley from 1990 to 2000, both in institutional fixed income sales and trading as well as an analyst in municipal finance.

Ms. Alfandary is a frequent speaker related to ESG investing. She is guest lecturer on ESG investing at Fordham University.

A native of California, Ms. Alfandary received an M.B.A. in Finance from Columbia Business School after earning her B.A. from Lewis & Clark College.



A. Bruce Audino

Senior Vice President, Senior Manager
Researcher
Bessemer Trust

Mr. Audino is Senior Vice President at Bessemer Trust. He is responsible for the selection and oversight of long-only external managers for both the Old Westbury Mutual Funds and External Manager Solutions (EMS) clients.

Prior to joining Bessemer, Bruce was Vice President at J.P. Morgan, responsible for long-only manager research and selection for the firm's corporate defined benefit and defined contribution plans. Before that, he was a product specialist at FactSet Research Systems, responsible for portfolio performance and risk applications.

Bruce earned a B.S. in business administration from Colorado State University.

Prior to joining Bessemer, Bruce was Vice President at J.P. Morgan, responsible for long-only manager research and selection for the firm's corporate defined benefit and defined contribution plans. Before that, he was a product specialist at FactSet Research Systems, responsible for portfolio performance and risk applications.

Bruce earned a B.S. in business administration from Colorado State University.



Ryan Bailey, CFA, FRM, CAIA, CMT

Head of Investments
Children's Health System of Texas

Ryan Bailey is the Head of Investments at Children's Health System of Texas, where he oversees \$1.7 billion in assets. Ryan and his team are responsible for creating and

managing the investment strategy for the Hospital's pension, foundation, operating cash, and long term pools. As the Hospital's inaugural investment officer, Ryan established the department, designing and implementing the systems, processes, and governance structures required in the formation of a top tier endowment office.

Prior to Children's Health, Ryan served as Investment Officer and Interim CIO of the Meadows Foundation. In this capacity, he drove the due diligence process, aided the development of strategic asset allocation, and constructed and implemented investment strategy to achieve competitive performance.

Ryan graduated from Yale University with a Bachelor of Arts degree in Economics. He holds a number of certifications including: Chartered Financial Analyst (CFA), Financial Risk Manager (FRM), Chartered Alternative Investment Analyst designation (CAIA), and Chartered Market Technician (CMT) designations. In 2000, he founded a trading company located on the 83rd floor of World Trade Center One and later, after surviving the events on 9/11, relocated to Dallas, Texas. Ryan was featured in the June 2011 issue of D magazine, was named one of the 40 under 40 in the April 2015 edition of Asset International—Chief Investment Officer Magazine (aiCIO), was also a finalist for the aiCIO's 2015 Next Generation Award and received the Institutional Investor 2016 Investor Intelligence Award recognizing Healthcare Institutions for Portfolio Construction. He was a finalist for CIO Magazine's Industry Innovation Award for Healthcare 2017 and the 2018 winner of Institutional Investor's Healthcare System of the Year Award. Ryan currently serves as a Director on the board of Blue Dolphin Energy (BDCO), Board Member for the Texas Hedge Fund and is an Angel for the Texas Wall Street Women.



Rob Balkema, CFA

Senior Portfolio Manager, Multi-Asset
Solutions
Russell Investments

Rob has primary responsibility for managing Russell Investments' US Retail and Institutional Multi-Asset Solutions, including the firm's traditional target risk balanced funds, outcome oriented portfolios, target date, and investment outsourcing mandates. In this role, he leads the team which integrates the firm's equity, fixed income, real asset, and alternatives capabilities globally. He is tasked with creating strategic asset allocations for the portfolios, selecting managers or passive alternatives to populate asset classes, integrating the firm's capital market insights, and positioning the total portfolio in order to help clients achieve their objectives. Rob has experience researching and managing both traditional and non-traditional assets from his 12 years in the industry, all of which are with Russell Investments.

Previously, Rob was a senior analyst in the investment process and risk group for the investment division at Russell Investments. In this role, Rob focused on improving the measurement, evaluation, and enhancement of Russell's portfolio management practice.

From 2006 until 2009, Rob was a member of the global equity team in multiple capacities. He was responsible for evaluating asset management firms worldwide that offer global, international and emerging market equity mandates and supported portfolio managers in the structuring and monitoring of Russell's global equity strategies.

Rob holds a B.A. in Economics from Harvard College.



Cheryl Barker

Senior Research Liaison
FEG Investment Advisors

Cheryl A. Barker has twelve years of investment experience and joined Fund Evaluation Group in 2012. As a senior research liaison, Cheryl is a member of FEG's Research Team, Investment Policy Committee and Global Equity Sector Team. Her primary research focus has historically been domestic equities, but her role has since expanded to include projects and initiatives across the Research Team.

Prior to joining FEG, Cheryl worked as a Consultant with DCAdvisors, Inc. in Minneapolis, MN where she performed investment research and co-managed client relationships in the ERISA consulting practice. Previously, Cheryl worked as an equity research analyst and coordinated client service activities for Oyster Capital Management LLC, an equity-focused hedge fund in Chicago, IL.

2018 AIMSE FALL CONFERENCE *biographies*

Cheryl received her Bachelor of Science degree in Business, cum laude, from Miami University (Ohio) and her Masters in Business Administration (MBA) in Finance and Investments from the University of Notre Dame. Cheryl also completed the highly-regarded Applied Investment Management Program at the University of Notre Dame.



Paul Benjamin, CFA

Director of Investments
Alcoa

Based in New York City, Mr. Benjamin is the Director of Pension Investments at Alcoa Corp. In 2017, he was named by CIO magazine one of the institutional investment Industry's 40-under-forty. Currently, Mr. Benjamin is responsible for asset allocation, manager selection and risk management of Alcoa's \$7+ Billion in global Pension and Foundation assets.

Prior to joining Alcoa, Mr. Benjamin was a Vice President at Brookfield Investment Management focusing on investment strategy and corporate development. Earlier in his career, Mr. Benjamin was an Investment Analyst and Fund Manager at General Motors Asset Management, where he was part of a lean investment staff responsible for \$150+ Billion in Pension and Insurance assets. During his career at GMAM, he had a multi-disciplined focus culminating in the management of an internal dynamic asset allocation strategy.

Mr. Benjamin completed his graduate studies at Cornell University where he earned an M.B.A. He earned his B.A. in Economics at University of Colorado Boulder. Mr. Benjamin is a CFA Charterholder.

Mary Cernilli

Managing Director, Absolute Return and Credit Strategies
(Former)
Emory University



Christopher Cesare

Founding Partner, Consultant
Rocaton Investment Advisors

Christopher Cesare, Consultant, is a founder and Partner of Rocaton. Chris joined Rocaton in 2002 after 6 years at Barra RogersCasey, where he served as Managing Director and Senior Consultant. Chris previously worked as a plan sponsor at United Parcel Service in Atlanta for 7 years. Chris earned an M.B.A. from Emory University and a B.S. with a major in Finance from the University of Connecticut.



Deborah Christie, CFA

Managing Director
Cambridge Associates

Deborah is a Managing Director in Cambridge Associates' Arlington office. She specializes in manager research for U.S. and Canadian equities and index funds. She also specializes in Women & Diverse managers and Gender Lens investing.

Prior to rejoining Cambridge Associates in 2011, Deborah co-founded Great Oak Investment Management. As Director of Research and Chief Compliance Officer, Deborah oversaw the firm's research efforts on small-cap equities and managed the firm's compliance program. Before starting her own firm, she was a research consultant at Cambridge Associates, where she identified and monitored equity managers and funds. In addition, Deborah spent several years at consulting firms where she valued businesses and assets for merger and acquisitions, stock option valuations, venture capital analysis, Employee Stock Ownership Plans (ESOP), estate and gift tax planning, and litigation.



Edward Coward

Institutional Consultant
Morgan Stanley Graystone

Edward Coward is an Institutional Consultant with Graystone Consulting, a business of Morgan Stanley, focused on providing a range of investment consulting services to institutional clients, including Foundations & Endowments, Health Care Organizations, Family Offices, and Retirement Plans.

Edward has worked with Morgan Stanley and its predecessor Firms since 1999. Edward has 19 years of experience in asset allocation strategy, investment policy development, and performance evaluation and measurement and has completed training in asset allocation modeling, statistical analysis, portfolio optimization, and style analysis. In addition, Edward publishes investment manager due diligence on investment management firms, prepares capital markets research, and asset allocation studies on behalf of the Group's institutional clients.

Prior to joining Graystone Consulting, Edward worked for five years at Citi Smith Barney's world headquarters as a Consulting Group analyst and was the recipient of the Consulting Group's "Analyst of the Year" award for outstanding performance in 2001 and 2002.

Edward recently was a guest lecturer at Columbia University on the topic of Nonprofit Management. Edward is a graduate of West Virginia University with a Bachelor's of Science in Business Administration – Finance.

**Peter Crivelli***

Senior Vice President, Institutional Sales
Carillon Tower Advisers

Peter Crivelli is responsible for institutional sales and consultant relations for Carillon Tower Advisers, a multi-boutique global asset management firm with approximately

\$70 billion in AuM and autonomous affiliates Eagle Asset Management, ClariVest Asset Management and Cougar Global Investments, Scout Investments and Reams Asset Management. Prior to joining Carillon Tower, Peter spent twelve years as a principal for the investment firm of Marvin & Palmer Associates. After that, he worked for a start-up investment firm for a year. He has more than 25 years of experience in the investment industry. Peter holds a Bachelor's degree in Economics from Wesleyan University and an MBA from New York University Stern School of Business. Peter has served as an adjunct professor at the University of Delaware and a board member for the Serviam Girls Academy in Wilmington, Delaware. He also has volunteered as a youth lacrosse coach.

**Jamie Cuadra Jr.***

Director
Compass Group, LLC

Mr. Cuadra is Sales Director in the New York office. He leads the global business development efforts for the institutional client channel and is responsible for managing

key accounts in the USA and Asia for the firm. Before his current position, Mr. Cuadra was an Associate on the Investment Products team coordinating portfolio construction, asset allocation, and manager selection for discretionary and non-discretionary client portfolios at Mercantil Commercebank Investment Services.

Mr. Cuadra holds a Bachelor's of Science degree in Industrial and Systems Engineering from Florida International University, as well as, Bachelors in Finance from Nova Southeastern University.

**Lewis Del Ponte***

Vice President, Institutional Sales
Ranger Capital

Mr. Del Ponte joined Ranger Capital Group in March 2015. He is the Vice President, Institutional Sales. Prior to joining Ranger in 2015, Mr. Del Ponte worked with Transamerica

Investments, working with national broker-dealers and registered advisers. Lewis attended The Ohio State University and majored in both academics and athletics as a member of the Varsity Wrestling team. He enjoys spending time with his wife and three children. Outside of the office Lewis still enjoys pushing himself as he is an avid Spartan Race participant.

**Ryan Dembinsky, CFA**

Senior Research Analyst, Fixed Income
Russell Investments

Ryan Dembinsky is a senior research analyst for Russell Investments. In this role, Ryan focuses on fixed income manager due diligence with primary areas of specialization

including securitized products and long duration, long credit, and LDI mandates. Ryan has been conducting fixed income research - on both managers and internal sector views and trade ideas – for six years.

Prior to joining Russell in 2011, Ryan served as associate director of Fixed Income Research at Rogerscasey for over five years. Ryan has a broad range of experience researching fixed income managers across all areas of the asset class including core, high yield, global, emerging markets debt, structured securities, bank loans, inflation-linked bonds, and credit-related alternatives.

He has also authored a variety of topical fixed income research publications such as identifying opportunistic investment opportunities, the evolution of emerging markets debt, and structuring liquidity pools. Prior to Rogerscasey, Ryan worked in fixed income relationship management at Weiss, Peck & Greer-Robeco USA.

Ryan has a B.A. from University of Michigan a M.B.A. from Baruch College. Ryan is also a CFA charterholder.

**Andrew Eberhart**

Chief Investment Officer (Former)
Heinz Family Office

Andrew Eberhart is the former Chief Investment Officer of the Heinz Family Office (HFO) where he directed the investment of the family's trusts and charitable entities.

Prior to the HFO, Andrew worked for several Wall Street firms including: Lazard Wealth Management (Chief of Investment Research); Marshall Fund (Managing Partner); Citigroup Private Bank (Managing Director); US Trust (Managing Director); and Cambridge Associates (Director of Cambridge Capital Advisors). He has been an active investor in emerging and frontier markets, including Iraq where the Marshall Fund focused its investment efforts. Andrew holds an MBA from the Wharton School of the University of Pennsylvania and an undergraduate degree from Cornell University. He served over twenty years on active and reserve duty as a U.S. navy pilot and retired with the rank of Captain.

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Paul Foster, CFA*

Head of Consultant Relations
The London Company

As Head of Consultant Relations for The London Company, Mr. Foster has principal responsibility for establishing, maintaining and deepening relationships with

global, national, and regional institutional consultants while coordinating efforts with institutional sales, client service and portfolio management. Mr. Foster has over 30 years of industry experience. Prior to joining The London Company, he spent three years as Global Head of Consultant Relations at Turner Investments following an 11 year tenure in consultant relations at Delaware Investments. Mr. Foster graduated Phi Beta Kappa and Magna Cum Laude from Furman University with a B.A. in History. He earned his MA in Ancient History from the University of Missouri, where he was named a Brady Fellow. Mr. Foster is a CFA charterholder and a member of the CFA Society of Philadelphia.



Benjamin Hall, CAIA

Director, Alpha Research
Segal Marco Advisors

Ben is a Director in Segal Marco Advisors' New York office with more than 12 years of industry experience. He is part of Segal Marco's Public Markets Equity Manager

Research team and a member of the Alpha Investment Research Group, which is responsible for Fundamental/Quantitative Manager Research. He has manager research responsibility across a broad range of long-only actively managed equity strategies including global, emerging market, non-U.S., and domestic equity products. In addition, Ben directs asset allocation and manager selection for Segal Marco's pooled discretionary public equity solution with assets under management of more than \$2 billion.

Prior to working at Segal Marco, Ben was an investment consultant at JLT Employee Benefits, in their London, U.K. office, where he was involved in a blend of manager research, fiduciary client consulting, for private and public sector clients.

Mr. Hall received a BA in Politics with Honors from the University of Nottingham. He holds the UK Investment Management Certificate (IMC) and the Chartered Alternative Investment Analyst (CAIA) designation. He is currently a Chartered Financial Analyst (CFA) Level III candidate.



Scott Howe, CAIA*

Senior Vice President, Business
Development
Candriam Investors Group

Scott Howe is a Senior Vice President based in Candriam's New York office with oversight of institutional business development in the U.S.

Before joining Candriam in 2018, Scott was responsible for U.S. institutional business development at Forester Capital, LLC, a hedge fund specialist he had joined in 2017 as Vice President of Investors Relations. Over the prior twenty years from 1996 to 2016, he was an AllianceBernstein veteran in U.S. institutional business development and client service. He also served in the same capacity within AB's two other distribution channels (2011-2012 in Retail and 2000-2003 in high net worth private client).



P. MacKenzie Hurd, CFA

Managing Director, Consultant Relations
Jennison Associates

MacKenzie Hurd joined Jennison Associates in November 2013 and is responsible for developing and managing consulting relationships. Previously, MacKenzie held

relationship management positions at Rainier Investment Management and The Capital Group Companies. He began his investment career at Callan Associates where he was a partner and senior investment consultant.

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



David Hyman, CFA

Partner & US Wealth Manager Solutions
Segment Leader
Mercer

David Hyman is a Partner in Mercer's Investments business and leads the US Wealth Management Segment. He works

with a variety of clients, which include financial intermediaries, corporations and non-profits. David assists his clients in developing and implementing their unique investment strategies to help them meet their long-term goals and objectives. David joined Mercer in 2011 after having worked at Evaluation Associates since 1999. Prior to joining Evaluation Associates, David worked as an investment research analyst at American Planning Group, a financial planning and asset management firm that serves high-net-worth individuals. David

is a frequent speaker at national industry conferences and events, addressing a wide variety of topics. David is a member of Mercer's internal Wealth Management Strategic Research Team and chairs the Equity Strategic Research Team.

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



Tasleem Jamal, CFA

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

Ms. Jamal graduated from McMaster University with Bachelor of Commerce and Bachelor of Arts (Psychology) degrees in 1996 and with an MBA (Finance) in 1999. In 1998, Ms. Jamal joined Ernst & Young Investment Advisory Services as an Investment Analyst and in 2000 she was promoted to Vice President. In this role she provided investment consulting services and managed the performance reporting team of analysts. In 2003, she joined Hewitt Associates as an Investment Consultant providing a variety of institutional client's investment consulting services including asset allocation, investment policy development, manager reviews and searches. In 2007, she joined Burgundy Asset Management where she focused on client relationship management and business development for Burgundy's Canadian institutional clients. Ms. Jamal was appointed Vice President of the firm in July 2010.

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

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

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



Geeta M. Kapadia, CFA

Senior Investment Strategist, Treasury
Yale New Haven Health System

Geeta Kapadia is a senior investment strategist at Yale New Haven Health System, where she leads the team responsible for managing assets of approximately \$3 billion.

She has been with the System since 2009, having previously worked at Mercer Investment Consulting in London and in Edinburgh, where she provided strategic investment advice to institutional investors. She has also held positions at Capital Metrics & Risk Solutions in Pune, India, and Stratford Advisory Group in Chicago. Kapadia holds an A.B. in mathematics from The University of Chicago and a master's degree in financial markets and trading from the Illinois Institute of Technology. She is a CFA charterholder and holds the UK's Investment Management Certificate. She has been an invited speaker at a variety of investment conferences. She is a member of CFA Institute and CFA Society of Philadelphia and served as a member of CFA Institute's Disciplinary Review Committee from 2008 to 2014. In 2016, she was named one of the Top 30 Women Rising Stars in Institutional Investing by Trusted Insight and a Rising Star in Health Care Investment by Institutional Investor.



Al Y. Kim

Director of Investments
Helmsley Charitable Trust

Al Y. Kim is Director of Investments at the Helmsley Charitable Trust. In this role, he is responsible for helping lead the development and implementation of the overall investment strategy for Helmsley, which entails portfolio management, manager research, and investment due diligence across all segments of the investment program. Prior to joining Helmsley, Al was a director in BlackRock's client solutions business which is responsible for developing investment solutions and managing the institutional OCIO mandates for a range of clients globally. Prior to BlackRock, Al was a consultant at Wilshire Associates where he advised public and corporate pension plans on their asset allocation, investment structure, and manager selection issues.



Ryan Lennie, CFA

Managing Director
Wilshire Associates

Ryan Lennie is a Managing Director of Wilshire Associates and a member of Wilshire Consulting. Mr. Lennie joined Wilshire in 2015 and is based in the Pittsburgh office. Mr. Lennie is a member of Wilshire's OCIO Solutions Team, with responsibilities for both investment and

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operational aspects of the firm's work with discretionary clients. In addition, Mr. Lennie serves as the lead consultant to health care, corporate and non-profit institutions. He is a member of Wilshire Consulting's ESG and Hedge Fund of Funds Asset Class Committees.

Prior to joining Wilshire, he worked at Gallagher Fiduciary Advisors where he was the lead consultant to health care, corporate, endowment, foundation and family trust clients. In addition, Mr. Lennie served as the Chair of Gallagher's Research Committee and as a member of the firm's Investment Committee. He earned a BS in mechanical engineering from Pennsylvania State University and an MBA from Emory University's Goizueta Business School. Mr. Lennie holds a Chartered Financial Analyst designation and is active in the CFA Society of Pittsburgh.

York City area and sits on the young board of iMentor, which helps underprivileged youth reach and achieve their goals to be first in their families to attend college. He enjoys running, golf, archery and creative writing.



Tim McAvoy

Client and Consultant Relations
Coho Partners, Ltd.

Tim McAvoy is a member of the Client and Consultant Relations team at Coho Partners. He has over 35 years of experience in sales and client service in the healthcare and institutional money management industries. Prior to joining Coho Partners, Tim was the Director of Sales at DePrince, Race & Zollo, a Partner and Director of Sales and Client Service at Marvin & Palmer Associates and held various sales, service, marketing and sales management roles at GlaxoSmithKline. Tim is a former AIMSE President and was the 2015 Lothrop Award recipient. He lives in the Philadelphia suburbs and is married with four children and three grandsons. Tim is also an avid tennis and platform tennis enthusiast.



Sean McCoy*

Director
Artisan Partners, Limited Partnership

Sean H. McCoy is a director on the institutional client services team at Artisan Partners and the business leader for the firm's Emerging Markets team. Prior to joining Artisan Partners in December 2016, Mr. McCoy was a consultant relations director at Investec Asset Management, North America and, before that, a director and senior consultant at Intersec Research, LLC focusing on non-US and EM equity strategies. Earlier in his career, Mr. McCoy was a global equity research specialist at Rocation Investment Advisors, LLC. Mr. McCoy began his career at Bank of Ireland Asset Management (US) and holds a bachelor's degree in psychology from Fairfield University.



Michael Meehan, CFA*

Director, Institutional Management
Putnam Investments

Mr. Meehan is a Director of Institutional Management in the Putnam Global Institutional Management group. He is responsible for business development and relationship management of public and corporate pension plans, insurers, and endowments and foundations located in the Eastern region of the United States and Canada. Mr. Meehan earned a B.S. from Boston University.



Kevin Machiz, CFA, FRM

Vice President, Fixed Income Investment
Consultant
Callan LLC

Kevin Machiz, CFA, FRM, is a Vice President and a fixed income investment consultant in Callan's Global Manager Research group.

He is responsible for research and analysis of fixed income investment managers and assists plan sponsor clients with fixed income manager searches. In this role, Kevin meets regularly with investment managers to develop an understanding of their strategies, products, investment policies and organizational structures. Kevin is a shareholder of the firm.

Prior to joining Callan in 2014, Kevin was a Senior Associate Product Manager at Franklin Templeton Investments. At Franklin, he was responsible for coverage of global fixed income strategies.

Kevin earned a BBA from Temple University with majors in Finance and International Business Administration (minor in Spanish). Kevin is a holder of the right to use the Chartered Financial Analyst® designation and is a member of the CFA Society of San Francisco and the CFA Institute. He is a Certified Financial Risk Manager.



Bart Marchant*

Regional Director
Northeast GQG Partners LLC

Bart Marchant is a Regional Director with GQG partners, developing and maintaining relationships with intermediary firms and teams in the Northeast US. Previously

Bart assisted in building out the Institutional business with WisdomTree from 2013 – 2017, covering both directs and consultants in the US & Canada; prior to that he supported the active equity teams in a CPM role with Goldman Sachs Asset Management. Bart is active in community service in the New

**Dan Melloh, CAIA**

Director Manager Research
Investment Performance Services, LLC

Mr. Melloh is the Director of Manager Research at Investment Performance Services, LLC and is responsible for overseeing the firm's research process and research analysts. In addition, he assists the IPS Investment Committee regarding manager recommendations and oversees the firm's educational materials. Dan specializes in manager research and due diligence on a broad range of alternative investments.

Prior to joining IPS in 2013, Mr. Melloh spent over eight years as a Partner and Manager of Investor Relations at a fund of hedge funds firm located in Philadelphia, PA. His responsibilities included consultant relations, marketing efforts, and ongoing client service for a broad range of institutional investors and advisors. He has significant experience working with multi-employer benefit funds.

Mr. Melloh earned an MBA from the Fox School of Business at Temple University and a B.S. in Business Administration from Villanova University. He is a holder of the Chartered Alternative Investment Analyst (CAIA) designation.

**Rachel S.L. Minard**

Founder & Chief Executive Officer
Minard Capital LLC

Rachel S.L. Minard is the Founder and Chief Executive Officer of Minard Capital, a leading independent, global asset raising consulting firm headquartered in San

Francisco, California. The firm is dedicated to offering strategic, asset raising consulting services to alternative investment management firms around the world. Minard Capital is not a broker/dealer nor third-party marketer.

Before building Minard Capital, Rachel built and managed global institutional investment businesses for 25 years, including 19 years building fund of hedge fund firms, notably Cadogan Management and Corbin Capital Partners. Having raised over \$14 billion in her career, Rachel started her marketing career in 1991 after her first company was hired to build the Ronald Reagan Presidential Library.

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

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

**John Mirante, CFA, CPA***

Senior Relationship Manager
BMO Global Asset Management

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

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

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

**Rick Nelson**

Principal
Syzygy Advisors LLC

Rick Nelson is Principal at Syzygy Advisors LLC, which encompasses board, advisory board, and consulting positions in addition to private investments. Those positions include Director – Transamerica Funds board; Director – Everest Medical Core Properties board; Advisory Board member – Global Index Group; Advisory Board member – Give To The World; and Owner – Annapolis Sailing School.

Prior to this Nelson served as Chief Investment Officer of Commonfund, the \$25 billion manager-of-managers providing traditional, hedge fund and private equity outsourced solutions to Endowments & Foundations. From 2003 to 2009 Rick served as Vice Chairman and CIO at ING Investment Management Americas, overseeing more than 300 people and \$165 billion in General Account and external client institutional and retail assets. Before then Rick oversaw \$90 billion of active, fundamentally driven equity portfolios as Managing Director and

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Head of U.S. Equity at JP Morgan Investment Management. Rick began his career as an investor at Bankers Trust, progressing from quantitative researcher to pension consultant to Head of Passive Investments and then Head of Global Quantitative Investments Group.

Rick earned an MBA at the Booth School University of Chicago, as well a Bachelor of Science degree from the Wharton School, University of Pennsylvania.



J. Douglas Newsome, CFA*

Managing Director, Director of Research
Perkins Fund Marketing

Mr. Newsome, Managing Director and Director of Research for Perkins Fund Marketing LLC, a placement agent firm focused on alternative strategies.

Mr. Newsome is responsible for sales in selected states and is also the firm's Director of new manager research and selection.

Mr. Newsome joined PFM in 2012 with over 25 years of industry experience working with hedge funds, private equity funds and traditional investment strategies. Previously, he was a Managing Director, International Business Development Group, with Babson Capital Management (now Barings LLC). Prior to Babson, he was a Managing Director at PricewaterhouseCoopers Corporate Finance LLC. Prior to PWC, he was founder and Chief Executive Officer of GMS Technologies, Inc., a financial technology firm. Prior to GMS, Mr. Newsome headed debt capital markets, syndicated loan sales and trading, and U.S. private placements at Santander Investment.

Mr. Newsome is also an Independent Trustee for Goehring & Rozencwajg Associates, a registered investment advisor focused on natural resources.

Mr. Newsome graduated from Muhlenberg College and earned an MBA from Lehigh University. He was awarded the CFA designation and has earned a certificate from the AIMSE/Wharton Institute for Investment Management Sales Executives. He holds the Series 7, 24, 31, 50 and 63 securities licenses.



Kevin P. Norton

Director of Investment Management
Archdiocese of New York

Kevin P. Norton, Director of Investment Management for the Archdiocese of New York, is responsible for overseeing the investment management of pension, endowment and foundation assets for the Archdiocese of New York and related entities. He works with their investment

consultant and Investment Committees to determine asset allocation and manager selection, and directs the implementation of investment policies and strategies.

Prior to joining the Archdiocese of New York in 2012, Mr. Norton was a Managing Director with BNY Mellon, responsible for new business development and relationship management for a select group of public sector and not-for-profit entities. Previously, he was Senior Vice President and Director of Institutional Marketing with Cohen & Steers Capital Management; a Principal with Lend Lease Real Estate Investments; and was a vice president at the Chase Manhattan Bank in Global Corporate Finance, Real Estate Finance, and headed Chase Asset Management's corporate pension sales group. Mr. Norton is a graduate of Georgetown University, and earned an MBA from the Wharton School of the University of Pennsylvania.



Ross Ondrusek, CFA, CFP

Senior Investment Research Analyst
USAA

Ross Ondrusek is a senior investment analyst for USAA's \$23 billion managed portfolios program. His responsibilities include portfolio construction, strategic and tactical asset

allocation, and manager research.

Ross started his career in 2006 helping USAA members with their investments and financial plans. He joined the portfolio management team in 2012. Ross has an undergraduate degree in finance and is a CFA® charterholder and CFP® professional.



Nolan O'Neill, CFA

Director, Manager Research
Pavilion Advisory Group Inc.

Mr. O'Neill serves as Director, Manager Research for traditional fixed income, global equity, and liquid alternatives. Together with the Chief Investment Officer, he oversees Pavilion Advisory Group Inc.'s (Pavilion) dedicated manager research platform, which conducts over 1,300 due diligence meetings with investment managers per year. He also helps inform Pavilion's views on capital market risks and opportunities, with input from the underlying research teams. His in-depth knowledge of investment managers and capital markets, and experience working with a variety of client types, allows him to serve as a resource across Pavilion's diverse client base. Mr. O'Neill joined Jeffrey Slocum & Associates in 2005 (Slocum's business was combined with Pavilion Advisory

Group Inc. in 2016) as a Fixed Income Intern. After a brief stint as an investment analyst, he joined the fixed income team in 2006. Mr. O'Neill held multiple positions on the team, most recently serving as Director of Fixed Income from 2015 to 2018. Mr. O'Neill received his B.A. in Finance from the University of Minnesota's Carlson School of Management and his MBA from the Booth School of Business at the University of Chicago. Mr. O'Neill is a CFA® charterholder and a member of the CFA® Society of Minnesota.



Francois Otieno

Director of Fixed Income
Segal Marco Advisors

Mr. Otieno is a Director in Segal Marco Advisors' Chicago office with 18 years of institutional investment experience. He has specialized expertise in asset management, plan sponsor advising, and investment consulting.

Prior to joining Segal Marco Advisors, Mr. Otieno served as a Senior Consultant at Aon Hewitt Investment Consulting, Inc. for nine years. In that role, he served as a senior member of the firm's manager research group focusing on fixed income, while working closely with a large number of clients in a variety of roles. Before that, he spent five years at Anthem, Inc., one of the largest health insurance companies in the nation, as a Senior Investment Consultant overseeing the managers within the investment program. Prior to that, he spent two years at Conesco Capital Management (rebranded as 40/86 Advisors) as an Investment Analyst in the Structured Products Group.

Mr. Otieno holds a BS degree in Business Administration as well as an MBA degree from Indiana State University. He is also a Level II candidate for the Chartered Alternative Investment Analyst (CAIA) designation.

Mr. Otieno frequently speaks on various fixed income related topics at industry conferences and has been quoted in various industry publications, including Bloomberg, FundFire, and top1000funds.com. In addition, he co-authored a research paper entitled, "Measuring Success in Fixed Income."



Andrew Parrillo

Founder
Newport Capital Advisers

Andrew D. Parrillo founded Newport Capital Advisers LLC in 1995 as a registered investment adviser to provide discretionary and consultative investment services with focused accountability. The firm's primary activity is research of all asset categories and investment managers that are utilized to implement tailored investment strategies for clients. Hedge funds have been a significant allocation in client portfolios since 1995.

Although the firm has engaged strategies from firms of all sizes, it has been especially interested in engaging firms in their early stages and those particularly mindful of the risks of asset and personnel growth. Mr. Parrillo regularly speaks about investment manager selection at various national investment conferences. Early in his investment career he managed the Trust Investment Division's Retirement Investment Department and was a member of the investment policy committee at Fleet National Bank. Before founding Newport Capital Advisers, he was a senior vice president of Wellesley Group, Inc., where he advised endowment funds and family offices on asset allocation and investment manager selection. He is a graduate of Boston University and served as a U.S. Air Force Captain and Senior Navigator.



Michael Perdsock

Research Director of Traditional Investments &
Senior Consultant
Gavion LLC

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



Tatiana Pohotsky, CFA

Senior Investment Officer, Group Leader Global Active Management
Bureau of Asset Management, NYC Office of the Comptroller

Tatiana Pohotsky is currently Group Leader—Global Active Management at the New York City Retirement Systems. Prior to this role, she had over 10 years experience as an Equity Analyst following the Consumer Staples and Discretionary sectors at firms such as Schroders PLC and Independence Investments. She began her equity training and investing career at PaineWebber Securities. Ms. Pohotsky received a BA with honors in Economics and Music Performance from the University of North Carolina at Chapel Hill. She also holds the Chartered Financial Analyst designation.

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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.



Dennis Santos

Vice President, Head of Manager Research
Investment Solutions Group – OCIO

Dennis Santos serves as the Head of Manager Research within State Street and also is a member of the OCIO Investment Committee. Mr. Santos has spent 16 years

in the investment industry and joined SSGA through the acquisition of GE Asset Management, where he has been employed since 2012. Throughout his career, Mr. Santos has held positions in manager research and asset allocation where he has been responsible for investment decisions in client portfolios across the spectrum of client type from family offices to corporate defined benefit plans. In addition to portfolio construction on institutional accounts, Mr. Santos has also been instrumental in the construction and management of several 40 Act sub-advised mutual funds. While leading the global manager research team across State Street, Mr. Santos has also led various employee engagement initiatives and simplification projects, making the organization more efficient and diverse. Mr. Santos is a former board member of multiple non-profits and holds a Bachelor's of Science in International Economics from Suffolk University and an MBA from Bentley University where he graduated with distinction.



Bei Saville, CFA, CAIA

Senior Endowments & Foundations Chief
Investment Officer
Northern Trust Corporation

Bei Saville is Senior Vice President and Senior Endowments and Foundations Chief Investment Officer at Northern Trust.

Bei serves as a member of the Northern Trust's Investment Oversight Committee, which oversees Northern Trust multi-manager program of over \$130 billion and over 100 client programs. Bei also serves as a member of Northern Trust's Endowment and Foundation Investment Committee.

Prior to joining Northern Trust, Bei was the Director of Alternative Investments at the Helmsley Charitable Trust, where she developed and implemented the overall investment strategy for the foundation and was principally responsible for alternative asset classes. Prior to Helmsley, Bei managed the alternatives portfolio at Pfizer and Morgan Stanley. Previously, Bei was at Strategic Planning and Acquisitions at Morgan Stanley and JPMorgan. She started her career at China National Real Estate Development Group.

Bei is on the Board of the Victoria Foundation and the Knowles Foundation, where she also serves on their Investment Committees and the Victoria Foundation's Program Related Investment Committee. She served on the Limited Partner Advisory Council for the Sponsors for Educational Opportunity Alternative Investments and the Princeton Roundtable Advisory Board.



Marcie Seely*

Assistant Vice President, Marketing & Client
Service
Pugh Capital Management, Inc.

Marcie assists in the firm's marketing initiatives, business development, consultant relations and client service efforts at Pugh Capital. She joined Pugh Capital with more than 9 years of experience in the financial services industry and has been with the firm since 2014. She is also an active member of the AIMSE organization. Prior to joining Pugh Capital, Marcie held positions in institutional marketing at Edge Asset Management and Russell Investments. Marcie graduated from University of Puget Sound with a B.A. in Business Leadership and a concentration in International Finance.

**Dr. Matthew Sherwood**

Director, Public Markets Investments
MMBB Financial Services

Dr. Matthew Sherwood is an accomplished investment professional with a strong track record of success. Dr. Sherwood began his asset management career at Morgan

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

Dr. Sherwood graduated Summa Cum Laude from the Honors Program at Liberty University in an accelerated three years. He went on to obtain his Masters of Business Administration, where he studied Finance and Economics, and graduated with honors. Sherwood has studied business quantitative methods and economic theory on the doctoral level, and obtained his Doctor of Philosophy in Business Administration from Northcentral University. Dr. Sherwood is an appointed Fellow in Business and Finance and an adjunct faculty member at the King's College, and a guest lecturer at Columbia University, where he lectures on Finance, Economics, and Derivatives. Sherwood is also an Investment Committee member and a member of the ESG/SRI Working Group for the Plan Sponsor Council of America (PSCA).

Susan Slocum

Chief Investment Officer & Treasurer
Children's Minnesota

**Melissa Smith***

Vice President, Consultant Relations
Ariel Investments

Melissa is responsible for cultivating and managing Ariel's consultant relationships. Prior to joining the firm, Melissa was vice president of consultant relations

for Deutsche Bank. In this capacity, she managed business development and client services for investment consultants. Previously, she was associate director of consultant relations for Calamos Investments. Beyond Ariel, Melissa is a member of several professional organizations including the Association of Investment Management Sales Executives, Women Investment Professionals, and 100 Women in Hedge Funds. Melissa earned her BA in finance from Illinois State University.

**Paul Staab, CFA**

Manager, Investments
Catholic Health Initiatives

Paul Staab is manager of Investments on a team that manages multi-asset class portfolios for an operating fund, foundations, defined benefit pension plans,

and an insurance company with a focus on monitoring current managers in the portfolios and conducting due diligence on prospective managers as well as broader portfolio management duties including asset allocation and risk management.

Prior to Catholic Health Initiatives, Paul was with Fund Evaluation Group, an institutional investment consultant based in Cincinnati.

**Matthew E. Stroud, CFA**

Senior Director, Global Pensions
Marsh & McLennan Companies

Matt Stroud recently joined Corporate Treasury of Marsh & McLennan Companies as a Global Pensions Director. In this role, Matt reports to MMC Treasurer and is responsible

for oversight of MMC-sponsored retirement plans globally.

Prior to joining MMC in March 2018, Matt served at Willis Towers Watson since 2003 where he held a variety of leadership positions, most recently as Head of Delegated Portfolio Management for the firm's \$40B in Delegated assets under management in the Americas.

Matt holds an MBA degree in Finance and Statistics/Operations Research and a Bachelor of Arts degree (cum laude) in Economics, both from the New York University. Matt is also a CFA charterholder.

**Andrew Tarvin**

Humor Engineer
Humor That Works

Andrew Tarvin is the world's first Humor Engineer teaching people how to get better results while having more fun. He has worked with thousands of people at 250+

organizations, including IBM, Microsoft, and the International Association of Canine Professionals. Combining his background as a project manager at Procter & Gamble with his experience as an international comedian, Andrew's programs are engaging, entertaining, and most important, effective.

He is a best-selling author, has been featured in The Wall Street Journal, Forbes, and FastCompany, and his TEDx talks have over one million views combined. He has delivered programs in 50 states, 20 countries, and 4 continents. He loves the color orange and is obsessed with chocolate.

2018 AIMSE FALL CONFERENCE *biographies*



Caroline Thomas

Assistant Vice President
Brown Brothers Harriman & Co.

Caroline Thomas joined Brown Brothers Harriman in 2010 and is a senior investment analyst in the Private Banking division of the firm. She received her B.A. in economics and history from Bates College and her MBA from Boston University.



Charles Van Vleet

Assistant Treasurer, Chief Investment Officer of
Pension Investments
Textron Inc.

Charles Van Vleet is Assistant Treasurer and Chief Investment Officer of Pension Investments at Textron Inc., Providence

RI. Together with an investment team of four, Charles has Trustee oversight of \$10.6BN in defined benefit and defined contribution assets for Textron's U.S., Canada and UK Plans providing retirement security for over 75,000 current and past employees. The Textron retirement Plans are well funded with broadly diversified investments including private equity, hedge funds, real estate, fixed income and public equity. In addition to investment oversight, Charles serves as a Member of Textron's Investment Committee, Investment Management group, Employee Benefits Committee, Trustee and Board Member of Textron's UK and Canadian Plans.

Prior to Textron, Charles spent 8 years as Director, Pension Investments at United Technologies in Hartford CT. Prior to pension investment Charles spent 25 years in the asset management divisions of Credit Suisse, Putnam Investments, Alliance Capital, Brown Brothers Harriman and Nomura Securities. At different times -living and working in New York, London and Tokyo- he has had the opportunity to manage '40 Act mutual funds, high net worth, endowment, public pension and corporate pension funds.

Charles holds bachelors' degrees in Economics and Political Science from UC Berkeley, Berkeley CA and an MBA from the University of CT (UConn) in Storrs, CT. Currently, Charles is a member of the Board of Directors and Chair of the Investment Subcommittee for CIEBA (Committee on Investment of Employee Benefit Assets) and serves on the investment advisory board for the Lifespan endowment, Rhode Island's largest not-for-profit health care system. In addition, he serves on the advisory board for Rhode Island's Local Initiatives Support Corporation (LISC), advisory committee for the Washington DC based, Managed Fund Association (MFA), Industry Affairs Committee for the Institutional Limited Partners' Association (ILPA) and Defined Contribution Alternatives Association (DCALTA).



Larry Vasquez, CFA

Partner & Senior Portfolio Manager, Equities
Mercer

Larry Vasquez is a Senior Portfolio Manager and Partner at Mercer Investment Management. His primary responsibilities include manager selection, portfolio construction and ongoing oversight of Defined Benefit Plans and Defined Contribution custom solutions. He is the Lead Portfolio Manager of the Mercer U.S. Large Cap, U.S. Small-Mid Cap, Non-U.S. Equity, Emerging Markets Equity, Global Low Volatility, Canadian Equity, and Global Equity Funds. Focus on constructing risk-aware multi-managed portfolios with complimentary alpha sources. He is also responsible for management and ongoing oversight of defined benefit and defined contribution customized solutions. Responsibilities include initial structure design, transition management, ongoing monitoring of the investment managers, and portfolio construction.

Larry's investment career began in 1997 at BARRA RogersCasey before joining SEI in 2000, where he held progressively senior positions, managing mutual fund assets in domestic and international multi-managed equities. He joined from UBS, where he was a Portfolio Manager responsible for multi-managed equity portfolios.

He is a graduate of Drexel University, with a B.S. in Commerce and Engineering and a concentration in Finance. He is also a Chartered Financial Analyst



Anthony S. Waskiewicz, Jr., CFA

Chief Investment Officer
Mercy Health

Mr. Waskiewicz has over 28 years of investment experience advising and managing assets for institutional investors. Mr. Waskiewicz is a skilled investor and leader with a proven track record managing teams and generating strong risk-adjusted returns using absolute-return focused portfolio construction techniques and thoughtful, differentiated manager selection processes.

Mr. Waskiewicz has over fifteen years experience as a chief investment officer managing endowment & foundation, reserve and pension portfolios, building investment programs, hiring staff, creating prudent investment solutions and establishing selection processes for products and managers across the equity, fixed income, real asset, hedge fund and private debt/equity markets.

Mr. Waskiewicz currently serves as Chief Investment Officer for Mercy Health (St. Louis, MO) managing the AA- rated

health system's short-term, endowment and pension plan assets, totaling \$2.8B in assets under management. With nearly 50 hospitals across Missouri, Arkansas, Oklahoma and Kansas, 40,000 employees and \$6B in net revenues, Mercy is the nation's 5th largest Catholic health system and known for its vibrant and entrepreneurial culture, innovative and pioneering spirit and desire to make a difference. Mr. Waskiewicz joined Mercy in February 2010 as the system's first chief investment officer charged with creating a top-performing in-house investment program. Under his leadership, Mercy has generated strong risk-adjusted returns while receiving industry recognition, including AI-CIO - Healthcare CIO of the Year (2017 & 2016 Nominee), Investor Intelligence Awards - Healthcare Plan of the Year (2015) and Healthcare Chief Investment Officer of the Year (2014); Institutional Investor Hedge Fund Awards - Healthcare System of the Year (Nominee 2014) and Institutional Investor Hedge Fund Awards - Rising Star (2012).

Mr. Waskiewicz has hired and mentored an award-winning investment team at Mercy. The team's Deputy CIO was acknowledged with the prestigious AI-CIO 40 Under 40 honor (2016) and the team's Senior Investment Analyst was honored as a Rising Star by Institutional Investor (2015) and as a Top 30 Women Rising Stars in Institutional Investing by TrustedInsight (2016).

Prior to taking on his first role as CIO in 2004, Mr. Waskiewicz spent fifteen years in the asset management and advisory business, working with and learning from industry leaders at T. Rowe Price, Mercer Investment Consulting, Evergreen Investments and Morgan Stanley.

Mr. Waskiewicz is an active member of the investment community serving as a member of the CFA Institute and the St. Louis Society of Investment Analysts. He is a frequent speaker and panelist at institutional investor industry conferences and roundtables and has served on the advisory board for various industry associations and conferences.

Mr. Waskiewicz serves as Chairman of the Board of Trustees at Villa Duchesne and Oak Hill School in St. Louis, where his two daughters recently graduated. Mr. Waskiewicz also serves as a trustee for Cooper-Anthony Child Advocacy Center (Hot Springs, Arkansas), as an investment committee member for the Missouri Health Foundation and for the Mid-American Transplant Association and as an adjunct professor in the business school at Webster University (St. Louis).



J. Andrew Webb, CFA, CPA

Director
Highland Associates

Mr. Webb joined Highland Associates in April of 2015, and serves as consultant to the firm's institutional client base as well as contributes to the firm's Capital Markets group. He is a Director and shareholder in the firm. Prior to joining Highland Associates, Mr. Webb was a senior investment analyst at Warren Averett Asset Management, where he served on their Investment Committee and Asset Allocation Committee. Mr. Webb also spent four years working as a Vice President of Investor Relations for Regions Financial and began his career at PricewaterhouseCoopers. He has been a panelist at many different investor conferences, including IMI Healthcare Forum and Capital Markets Group Institutional Investment Forums. Throughout his career, he has contributed articles to CNBC and Seeking Alpha on topics ranging from capital markets to financial literacy. He received his Bachelor of Science and his Master of Accountancy from the University of Alabama. Mr. Webb is a CFA charterholder and a Certified Public Accountant (CPA).

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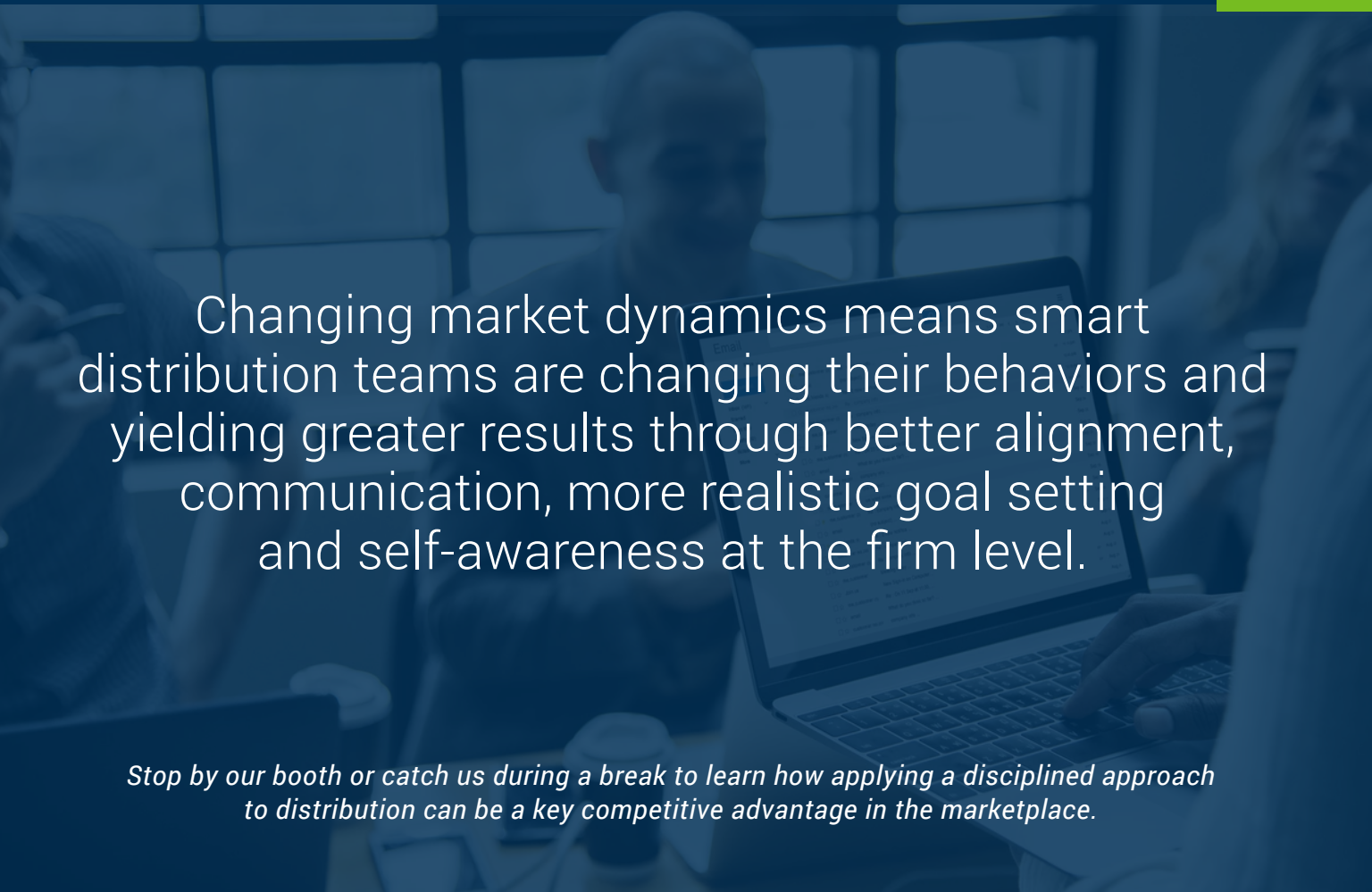
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