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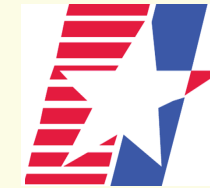


**Value Added
Ideas for Your
Portfolio –**

Risk, Governance and Return

**Seventeenth Annual
National Pension and
Institutional Investor Summit**

PROGRAM



Dallas Marriott Quorum Hotel
Dallas, Texas
Tuesday, November 15, 2011

Coordinated By:

**THE NATIONAL SOCIETY OF INSTITUTIONAL
INVESTMENT PROFESSIONALS**

Summit Underwritten By:

THE BOSTON COMPANY ASSET MANAGEMENT, LLC
and
ING INVESTMENT MANAGEMENT

8:00 - 845 a.m. Breakfast and Registration

8:45 a.m. Invocation and Pledge of Allegiance

Bruce Cox Fort Worth Employee's Retirement Fund

Todd Cox Fort Worth Employee's Retirement Fund

8:50 a.m. Welcome

Ruth T. Ryerson Co-Chair, Fort Worth Employee's Retirement Fund

John E. Thompson, Jr. Co-Chair, Energy Future Holdings Corp.

Carl T. O'Connell The Boston Company Asset Management, LLC

Darren Massey ING Investment Management

9:00 – 9:45 a.m. Kickoff Speaker

Christine Hurtsellers ING Investment Management U.S.

“Debt and Deficit Crises: Navigating the Realities of a Deleveraging World”

9:45 - 10:45 a.m. Panel - LDI - De-risking in a low and rising interest rate environment

Speaker: **Dan Tremblay**, Fidelity Investments

Moderator: **Jennifer Shannon**, The Aerospace Corporation

Panelists: **Wyatt Crumpler**, American Airlines

Gary Knapp, Prudential

Joe Ramos, Lazard Asset Management

10:45 - 11:00 a.m. Break

11:00 - 12:00 p.m. Breakouts

Breakout No. 1: DC Plans - Retirement income and inflation protection, Developing the final payout phase

MC: **John Pickett**, CAPTRUST Advisors

Speakers: **Drew Carrington**, UBS Global Asset Management

Chip Castille, Blackrock

David Deming, Dimensional Fund Advisors

Breakout No. 2: Public plans - Defending your Defined Benefit Plan

Speaker: **Rocky Joyner**, The Segal Company

Breakout No. 3: Foundations, Endowments and Private Offices - Issues

Moderator: **Randy Kopsa**, Boy Scouts of America, National

Panelists: **Rodric E. Cummins**, GuideStone

Byron Gossett, The Bridgeworks Group

Paula Herring, Meadows Foundation

12:00 - 1:30 p.m. Luncheon Speaker

Jack Malvey BNY Mellon

“Asset Management in The Great Transition Age”

1:30 - 2:30 p.m. Panel - Alternatives - Seeking return/reducing risk

Speaker: **David Perry**, TeamCo Advisers

Moderator: **Matt DenBleyker**, Larry Thompson & Associates

Panelists: **Clint Carlson**, Carlson Capital

Robert Hulme, Fort Worth Employees' Retirement Fund

Sandy Kaul, Citi Prime Finance

Jerry Swank, Swank Capital

2:30 - 3:30 p.m. Panel - CIO Outsourcing - How much control to delegate, the role of staff, and the manager selection process

Speaker: **Ed Berman**, Neuberger Berman Trust Company

Moderator: **Joe Wright**, Baptist Foundation of Texas

Panelists: **Ed Berman**, Neuberger Berman Trust Company

Clinton Cary, Hewitt EnnisKnupp

Heath Miller, Shepherd Kaplan

Wanda Valentine, Fort Worth Employees' Retirement Fund

3:30 - 3:45 p.m. Break

3:45 - 4:45 p.m. Panel - Real Return - Investing in infrastructure, commodities, TIPs, and real estate

Speaker: **Nicholas Koutsoftas**, GE Asset Management

Moderator: **Dan O'Grady**, AT&T Inc.

Panelists: **John Abunassar**, William Blair

Tim Bray, GuideStone

Karen McQuiston, Jennison Associates

Joyce Shapiro, Franklin Templeton Real Asset Advisors

4:45 - 5:00 p.m. Closing Remarks

5:00 - 6:00 p.m. Reception