

# 2015 Summit: Challenging Markets

## How to prepare your portfolio?

### The 21st Annual National Pension and Institutional Investor Summit

**TUESDAY, NOVEMBER 17, 2015**

Underwriters: Sandy Sinor, Voya Investment Mgt & Carl T. O'Connell, The Boston Company

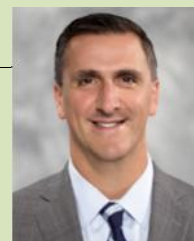
**8:15AM - 8:45AM Registration and Breakfast Buffet**

**8:45AM - 9:00AM Pledge, Invocation, and Welcome**

**9:00AM – 9:45AM Kick-Off Presentation**

#### **Finding Opportunities in a Challenging Fixed Income World**

Speaker: **Ralph Divino**, Voya Investment Mgt



**9:45AM - 10:45AM Fixed Income Trends**

**9:45AM Introduction**, Nick Maroutsos, Janus Global Macro

**10:00AM Panel Discussion**

Moderator: Bradley Davis, Asset Consulting Group

Panelist: Tom Gregory, Maranon Capital, L.P.

Panelist: Jeffrey Sherman, CFA, DoubleLine Capital

Panelist: Karen Bater, CFA, Aberdeen Asset Mgt.

**10:45AM - 11:05AM Networking Break**

**11:05PM – 12:00PM Breakout Sessions:**

Breakout Panel #1 – **Defined Contribution Plans**

Moderator: Scott Freeman, LCG Associates, Inc.

Panelist: Aaron T. Borders, Dimensional Fund Advisors

Panelist: Piers Hurley, CFA, UBS Financial Services

Panelist: Mary Beth Glotzbach, Franklin Templeton

Panelist: Erica Swett, Mercer



Breakout Panel #2 – **Defined Benefit Plans**

Moderator: Charles G. Ballard, Kimberly-Clark Corporation

Panelist: Dave R. Wilson, Nuveen Asset Management

Panelist: Rohit Mathur, Prudential Financial

Panelist: Robert G. Smith III, Sage Advisory Services

Panelist: Thomas Lee, Parametric



Breakout Panel #3 – **SRI – Socially Responsible Investing**

Moderator: John C. Furlow Jr., Texas Presbyterian Foundation

Panelist: Allen Campbell, ConsientiousInvesting.com

Panelist: Michael Cantara, MFS Investment Management

Panelist: G. Benjamin Bingham, 3Sisters Sustainable Mgt

Panelist: Ethan Levine, Commonfund Capital



**12:00PM - 1:30PM Luncheon Presentation**  
**Revolution in Energy**

Speaker: **Robin Wehbé**, The Boston Company



**1:30PM - 2:35PM Equity Trends**

Moderator: Leandro A. Festino, CFA, CAIA, Meketa Investment

Speaker/  
Panelist: Kathryn Langridge, Manulife Asset Management  
Panelist: Michael Cantara, MFS Investment Management  
Panelist: Karen E. McQuiston, Jennison Associates  
Panelist: Gene B. Neavin, Federated Investors



**2:35PM - 3:10PM Real Assets**

Moderator: Michael Duignan, J.P. Morgan Asset Management

Panelist: Brooks Monroe, Invesco  
Panelist: Vince Childers, CFA, Cohen & Steers



**3:10PM - 3:30PM Networking Break**

**3:30PM - 4:00PM ETF's – Exchange Traded Funds**

Moderator: Robert Butler, CFA, PRM, Butler Advisory Services

Panelist: Emily Foote, CFA, BlackRock  
Panelist: Robert S. Melton, State Street Global Advisors



**4:00PM - 4:45PM Hedge Funds**

Moderator: Thomas Deegan, Clearbrook Global Advisors

Panelist: Sam Diedrich, PAAMCO  
Panelist: Christopher G. Kirk, CFA, Wellington Management  
Panelist: Shawn Steel, CFA, BlackRock



**4:45PM - 5:00PM Concluding Remarks**

John E. Thompson, Jr., President and Executive Director, NSIIP

**5:00PM - 6:00PM Closing Networking Reception**

