

2015 Summit: Challenging Markets - How to prepare your portfolio?

The 21st Annual National Pension and Institutional Investor Summit

MONDAY, NOVEMBER 16, 2015

7:00AM - 4:15PM **TEXPERS' Basic Trustee Training**
 5:00PM - 6:00PM **NSIIP Texas Advisory Board**
 6:00PM - 7:00PM **Summit Opening Reception**
 7:30PM **Private Dinner** (for Plan Sponsors, Foundations, Endowments, Family offices and Consultants)

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**

