

2015 Summit



Breakout Panel Discussion:

DC Plans:

The shift from DB to DC plans, income sufficiency, and white labeling trends.

Moderator:

Scott Freeman, LCG Associates

Panelist:

Aaron T. Borders, Dimensional Fund Advisors

Piers Hurley, CFA, UBS Financial Services Inc.

Mary Beth Glotzbach, Franklin Templeton
Investments

Erica Swett, Mercer



21st National Pension and Institutional Investor Summit
Tuesday, November 17, 2015

2015 Summit



Breakout Panel Discussion:

DB Plans:

LDI for public plans, LDI completion, annuitize liabilities, investment policy, governance, and fiduciary issues.

Moderator:

Charles G. Ballard, Kimberly-Clark Corporation

Panelist:

Dave R. Wilson, Nuveen Asset Management

Rohit Mathur, Prudential Financial Inc.

Robert G. Smith III, Sage Advisory Services Ltd.

Thomas Lee, Parametric



21st National Pension and Institutional Investor Summit
Tuesday, November 17, 2015

2015 Summit



Breakout Panel Discussion:

SRI Investing:

SRI, ESG, and Impact Investing – what do they mean for your portfolio in terms of legal concerns, IRR, risks and values.

Moderator:

John C. Furlow Jr., Texas Presbyterian Foundation

Panelist:

Allen Campbell, ConsientiousInvesting.com

Ethan Levine, Commonfund Capital

Mike Cantara, MFS Investment Management

G. Benjamin Bingham, 3Sisters Sustainable
Management LLC



21st National Pension and Institutional Investor Summit
Tuesday, November 17, 2015