



## 2016 Summit: Governance - are you protecting your portfolio?

### SUNDAY, OCTOBER 30, 2016

**5:30PM - 6:30PM** **Summit Opening: Networking Reception**  
**7:00PM** **Private Dinner** (for Plan Sponsors, Foundations, Endowments, Family offices and Consultants)

### MONDAY, OCTOBER 31, 2016

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

**8:15AM - 9:00AM** **Registration and Breakfast Buffet**  
**9:00AM - 9:15AM** **Pledge, Invocation, and Welcome**

**9:15AM - 10:00AM** **Kick-Off Presentation**  
**How Much Risk is in Your Benchmark?**  
 Speaker: **John C. Bailer, CFA**  
 The Boston Company



**10:00AM - 10:55AM** **Compliance**  
 Moderator: Randy Kopsa, Retired BSA, National  
 Panelist: Karen Soefje, Montgomery Coscia Greilich LLP  
 Panelist: Deborah A. Castellani, Akros Fiduciary Management  
 Panelist: Craig White, Cambridge Associates LLC  
 Panelist: Patty Weiland, HighGround Advisors

**10:55AM - 11:15AM** **Networking Break**  
**11:15AM - 12:15PM** **Breakout Sessions:**

Breakout Panel #1 – **Corporate Pension Plans**  
 Moderator: John Pickett, CAPTRUST Financial Advisors  
 Panelist: David Wilson, Nuveen Asset Management  
 Panelist: Ron E. Hagan, Roland|Criss Fiduciary Services  
 Panelist: Debbie Ozee, Prudential Retirement

Breakout Panel #2 – **Public Pension Plans**  
 Moderator: Paul Brown, TEXPERS  
 Panelist: Natalie Sorrell, Dallas Employees' Retirement Fund  
 Panelist: Michael Phemister, DFW Airport  
 Panelist: Dan Martell, 3Sisters Sustainable Management, LLC

Breakout Panel #3 – **Foundations/Endowments/Family Offices**

Moderator: Greg Dowell, Lamar University  
 Panelist: Fred Richmond, Texas Scottish Rite Hospital for Children  
 Panelist: Joe Wright, HighGround Advisors

**12:15PM - 1:00PM** **Lunch**  
**1:00PM - 1:45PM** **Luncheon Presentation**  
**Efficacy of Low Rates and the Global Economic Outlook**  
 Speaker: **Guy V. Petcho**  
 Voya Investment Management



**1:45PM - 2:40PM** **Traditional Assets – seeking return**  
 Moderator: Tim Bray, GuideStone Capital Management  
 Panelist: Doug Foreman, Kayne Anderson Rudnick  
 Panelist: Chad Nettleship, State Street Global Advisors  
 Panelist: Dory Wiley, Commerce Street Holdings  
 Panelist: Zane Brown, Lord Abbett

**2:40PM - 3:25PM** **Alternative Assets – seeking returns**  
 Moderator: Jacob Bowland, Fort Worth Employees' Retirement  
 Panelist: Michelle Butler, Cohen & Steers  
 Panelist: Chris Zogg, Smith Group Asset Management  
 Panelist: Jim Dykstal, DeMarche Associates

**3:25PM - 3:50PM** **Networking Break**  
**3:50PM - 4:45PM** **Consulting Trends**  
 Moderator: Eric Nedderman, Pension Portfolio Manager  
 Panelist: Nolan M. Bean, Fund Evaluation Group, LLC  
 Panelist: Fred Stewart, LCG Associates  
 Panelist: Jeff Foley, Solovis, Inc.

**4:45PM - 5:00PM** **Concluding Remarks**  
 John E. Thompson, Jr., President and Executive Director, NSIIP

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

### TUESDAY, NOVEMBER 1, 2016

**8:00AM - 4:15PM** **TEXPERS' Basic Trustee Training**

