

MERCER HAMMOND NON-PROFIT AND PRIVATE WEALTH CONFERENCE

# INNOVATION – NEW APPROACHES TO MANAGING YOUR INVESTMENTS

SEPTEMBER 8–10, 2014



# AGENDA

TUESDAY, SEPTEMBER 9

TIME	SESSION/SPEAKER(S)	LOCATION
7:00 am–9:00 am	Breakfast	Ballroom Salon 2
9:00 am	Welcome Kim Wood, Investments Business Leader, Non-Profit Segment	Ballroom Salon 1
9:15 am	Keynote — Incubating Innovation Chris Miller, Founder and CEO, The Mission Center	Ballroom Salon 1
10:15 am	Break	Ballroom Foyer
10:35 am	Portfolio Management for the Next Decade Panel: Christine Bradford, Senior Investment Consultant Anthony Brown, Head of Strategic Research, US Sean Chatburn, Manager Research, Equity Boutique	Ballroom Salon 1
11:20 am	Investing for Global Scarcity Wendy Hershey, Senior Investment Consultant	Ballroom Salon 1
11:50 am	Best Ideas — Equity R. Andrew Beck, President and CEO, Senior Portfolio Manager, River Road Asset Management Matt Reckamp, Manager Research, Equity Boutique	Ballroom Salon 1
12:10 pm	Lunch	Ballroom Salon 2
1:20 pm	Governance Is Critical to Information Security Program Success Renee Guttman, Vice President, Information Risk, Accuvant	Ballroom Salon 1
1:40 pm	Best Ideas — Fixed Income: Unconstrained Emerging Market Debt Natalie Corrado, Manager Research, Fixed Income Boutique David Dowsett, Partner, Co-Chief Investment Officer, Head of Emerging Market Sovereign, BlueBay Asset Management	Ballroom Salon 1
2:00 pm	Retirement Strategy in the Non-Profit World: Is Your Plan Ready? Joe Libbra, Senior Investment Consultant Lori Wright, Defined Contribution Specialist	Ballroom Salon 1

TIME	SESSION/SPEAKER(S)	LOCATION
2:30 pm	Luck vs. Skill In Hedge Funds Dave McMillan, Director of Hedge Funds	Ballroom Salon 1
2:55 pm	<b>Breakout Sessions</b>	
	Health Care Industry Transformation: Helping You Find Order in Chaos Mike Ancell, National Segment Leader for Health Care, Investments Anthony Spezia, President and CEO, Covenant Health Lori Wright, Defined Contribution Specialist	Promenade Room 2nd Floor
	Audit — Best Practice and Helpful Hints Gina Houston, Director of Client Support Panel: Karen Angell, Audit Partner, Higher Education/ Not-for-Profit, Baker Tilly Virchow Krause, LLP Peggy Lensing, Controller, Luther College Diane Tacke, CPA, Vice President for Finance and Administration, Luther College	Consulate Room 2nd Floor
	Sorting Through the Complexities of Debt Issuance Christopher Cozzoni, Senior Investment Consultant Janet Laney, Managing Director, Education, Piper Jaffray & Co. Keith Morgan, Managing Director, Education, Piper Jaffray & Co.	Ambassador Room 2nd Floor
	The Interaction of Spending and Portfolio Construction Chris Adkerson, National Segment Leader — Endowments	Pavilion Room 2nd Floor
	Intergenerational Investment Strategies Jack Dwyer, Senior Investment Consultant, Family Office and Ultra High Net Worth Individuals Michael Pompian, National Segment Leader, Family Office and Ultra High Net Worth Individuals	Colonnade Room 2nd Floor
	Implementing Private Equity for Smaller Investors Erik Sebusch, Private Equity Researcher, Alternatives Boutique Reid Smith, Private Equity Researcher, Alternatives Boutique	Ballroom Salon 1
3:25 pm	Break	Ballroom Foyer
3:45 pm	Investment Innovation or Fad? Rich Nuzum, Investments Business Leader, North America Jerry Woodham, Senior Investment Consultant	Ballroom Salon 1

TIME	SESSION/SPEAKER(S)	LOCATION
4:15 pm	<p><b>Mercer Idol</b>  Judges: Pamela Fennelly Campbell, Managing Director,  Hedged Strategies, Washington University  Investment Management Company  Tom Murphy, US Head of Delegated Solutions  Anne Reid, Treasurer, Moravian College</p> <p><b>Global Listed Infrastructure</b>  Carissa Tepovich, Senior Investment Consultant</p> <p><b>Liquid Alternatives</b>  Geoff Wilson, Senior Investment Consultant</p> <p><b>Opportunistic Investing: Sub-Saharan Africa</b>  Matt Geels, Senior Investment Consultant</p>	Ballroom Salon 1
5:15 pm	<p><b>Wrap Up of Day One</b>  Russ LaMore, National Segment Leader — Foundations</p>	Ballroom Salon 1
6:00 pm	<p><b>Departure for City Museum</b>  Meeting Point: Side Entrance near Monarch Ballroom</p>	
6:30 pm	Dinner at City Museum	City Museum
9:30 pm	Departure for Hotel	

## WEDNESDAY, SEPTEMBER 10

7:00 am–9:00 am	<b>Breakfast</b>	Ballroom Salon 2
7:45 am	<p><b>Optional Breakfast Session: Affordable Care Act Impact on the Non-Profit World</b>  Bradley Cornish, Principal and Senior Actuary  Christopher Watts, Partner and Senior Consultant</p>	Pavilion Room 2nd floor
9:00 am	<p><b>Welcome Back</b>  Tim Westrich, Senior Investment Consultant</p>	Ballroom Salon 1
9:05 am	<p><b>Assessing Investment Success</b>  Beth Johnson, Senior Investment Consultant  Shaum Shrinivas, Asset Allocation Specialist</p>	Ballroom Salon 1
9:35 am	<p><b>Best Ideas — Hedge Funds</b>  Dave McMillan, Director of Hedge Funds</p>	Ballroom Salon 1
10:05 am	<p><b>Mission Investing: Is It for You?</b>  Panel: Jane Ambachtsheer, Global Head, Responsible Investment  Victor De Luca, President, Jessie Smith Noyes Foundation  Craig Metrick, US Head, Responsible Investment</p>	Ballroom Salon 1

TIME	SESSION/SPEAKER(S)	LOCATION
10:35 am	<a href="#">Where Is Real Estate in the Cycle?</a> Paul Kolevsohn, Manager Research, Real Estate Boutique	Ballroom Salon 1
10:45 am	<a href="#">Break</a>	Ballroom Foyer
11:05 am	<a href="#">Risk: A New Approach to an Old Concept</a> Travis Pruitt, US Business Leader, E&F Outsourced CIO Solutions	Ballroom Salon 1
11:50 am	<a href="#">Best Ideas — Private Equity</a> Harry Leggat, Portfolio Manager, Private Equity Erik Sebusch, Private Equity Researcher, Alternatives Boutique Robert F. Smith, Founder, Chairman, and CEO, Vista Equity Partners	Ballroom Salon 1
12:20 pm	<a href="#">Turning Intent Into Action: Applying Investment Ideas to Portfolios</a> Stan Mavromates, Chief Investment Officer, North America Kim Wood, Investments Business Leader, Non-Profit Segment	Ballroom Salon 1
12:50 pm	<a href="#">Conference Close</a> Kim Wood, Investments Business Leader, Non-Profit Segment	Ballroom Salon 1
1:00 pm	<a href="#">Lunch</a>	Ballroom Foyer

## HOLIDAY MAIL FOR HEROES



Send holiday cards to service members, veterans, and their families. Please visit the table located in the Ballroom Foyer during the conference to sign one of the cards available. This is a great way to give back by sharing your kind words and thanks with those who have given a great deal to their country.