THE WINTER INVESTMENT INSTITUTE FORUM
BARINGS GLOBAL HEADQUARTERS
(ADJACENT TO THE KIMPTON TRYON PARK HOTEL)
CHARLOTTE, NC
FEBRUARY 24-25, 2020
(Open to Non-Members & Current Members)

EDUCATIONAL FORUMS THAT INSPIRE
A CULTURE OF COLLABORATION AND
COMMUNITY AMONG INSTITUTIONAL
INVESTORS, FAMILY OFFICES,
CONSULTANTS AND ASSET MANAGERS

THIS IS A DRAFT PROGRAM WITH KEYNOTES, SPEAKERS, TOPICS & TIMINGS BEING UPDATED DAILY!

FOR MORE INFORMATION ON JOINING OUR COMMUNITY:
WWW.THEINVESTMENTINSTITUTE.ORG
The Investment Institute (TII) was originally founded in 2008 specifically to educate the investment community in North Carolina as well as other southeastern states. In 2016, we expanded to include investors and managers from around the country, while still maintaining a strong emphasis on the southeast where our roots were formed. TII is an unbiased educational investment conference provider which offers non-commercial investor education and does not offer any other investment products or consulting services. Our membership and conference registration fees, along with our sponsorship contributions, are the sole revenue source of The Investment Institute. TII is co-owned by Andrea Szigethy, Founder & CEO, and Donna Holly, President, who have been working alongside each other as educators in the financial sector for over 18 years! Together they have built an organization that provides their clients a relaxed, comfortable, friendly, and non-sales type of atmosphere, fostering an environment to learn and connect with one another in a way that promotes lifelong relationships, trust and friendship among institutional and private investors, consultants and asset managers. Our meetings are just the right size! We typically limit our attendance at our Fall & Spring (Members Only) Forums, to less than 300 participants to enable members to meet almost everyone over the course of the meeting. As we continue to grow our organization, we welcome new investors into our circle of friends and family and are always interested in meeting and speaking with new niche managers who, when an available spot opens, we can allow access to join our membership community or attend one of our non-member events.

TII brings senior investment decision-makers from leading endowments, foundations, pension funds, single family offices (SFOs), multi-family offices (MFOs), RIAs, consultants, outsourced CIO firms, asset management firms and other financial institutions together for face-to-face conversations, debate and problem-solving. TII has become known as one of the leading conference providers that strives for a high percentage/good ratio of allocators to managers/service providers in the audience at each of the forums. TII features some of the most well-known and leading money managers, policy makers, economists, research strategists and business leadership gurus along with some of the most prominent institutional and private investors. The programs cover complex issues surrounding the financial industry and the speaker faculty analyzes risk while revealing many opportunities in the current market environment.

Our distinguished Editorial Committee, which reflects a cross section of various types of sophisticated institutional and private investors, engage with TII to set the direction and develop the cutting-edge timely topics and themes for all of our forums. It is with their guidance that we develop new and innovative ideas to educate our members. The Editorial Committee assists TII in the recruitment of speakers, drives the content by selecting topics, and also acts as an informal advisory board and strategic resource. It is our goal to keep our investment community abreast of industry practices on a “real-time” basis at each of our programs and to sharpen the understanding of critical factors impacting both long and short-term investment ideas leading to better investment returns.

At TII, we do our best to encourage members not to solicit fellow attendees for investments or services during our forums. Exchanging business cards is entirely appropriate and we specifically dedicate time during the opening evening of each of our forums to bring everyone together for a down-to-earth, relaxed networking dinner in a very comfortable setting, allowing members to get to know one another in a low-key and welcoming way.

A membership subscription is required to gain access to our Spring (May) & Fall (October) Forums. However, in February of 2020, we will be offering a new program, The Winter Investment Institute Forum, in Charlotte, NC. This will be open to non-members as well as to current members of TII (member discounts available). There will be limited seating at this new addition to our conference roster, which will take place on February 24-25, 2020. All of our programs are held strictly off-the-record with no media or press in attendance.
INTRODUCING THE WINTER INVESTMENT INSTITUTE FORUM
KEYNOTE SPEAKER FACULTY

FEATURED KEYNOTES

Anthony Atala, MD
George Link Professor and Director
Wake Forest Institute for Regenerative Medicine

Mary Cahill
President, Rivington Capital, Inc. & Former CIO, Emory Investment Management (Emory University)

Dan Clifton
Partner & Head of Policy Research
Strategas Securities

Rod Collins
Director of Innovation / Author
Optimity Advisors / Wiki Management

Bob Litterman
Chairman, Risk Committee
Kepos Capital

Vikram Mansharamani
Global Trend-Watcher, Harvard University Lecturer, & Portfolio Manager, Author Boombustology

Sally Staley
Trustee & Chair of Investment Committee, The College of Wooster & Former CIO, Case Western Reserve University

David Thomas
Founder & Chief Investment Officer
Atalan Capital Partners

Mark W. Yusko
CEO & Chief Investment Officer
Morgan Creek Capital Management
## TII Winter Keynotes, Speaker Faculty

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<th>Name</th>
<th>Title and Role</th>
<th>Institution/Position</th>
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<td>Anthony Atala, MD</td>
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<td>Rael Gorelick</td>
<td>Partner &amp; Head of Investments</td>
<td>Biltmore Family Office</td>
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<td>Chairman, Risk Committee</td>
<td>Kepos Capital</td>
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<tr>
<td>Vikram Mansharamani, Ph.D</td>
<td>Global Trend-Watcher Portfolio Manager &amp; Author</td>
<td>Harvard University Lecturer Boombustology: Spotting Financial Bubbles Before They Burst</td>
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<tr>
<td>Christopher R. Pavese, CFA</td>
<td>President &amp; Chief Investment Officer</td>
<td>Broyhill Asset Management (BAM)</td>
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<td>Mark Roberts</td>
<td>Chief Investment Officer</td>
<td>Ironsides Asset Advisors Winter Forum Co-Chair / TII Editorial Committee Member</td>
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<td>Sally Staley</td>
<td>Trustee &amp; Chair of Investment Committee Former CIO</td>
<td>The College of Wooster Case Western Reserve University</td>
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<td>Emily Sumner</td>
<td>Senior Investment Manager</td>
<td>Gilder Office for Growth</td>
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<td>Daniel Ward</td>
<td>Chief Investment Officer</td>
<td>Virginia Tech Foundation TII Editorial Committee Member</td>
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<td>Campbell Wilson</td>
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<td>Old Well Partners</td>
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<td>Mark W. Yusko</td>
<td>CEO &amp; Chief Investment Officer</td>
<td>Morgan Creek Capital Management TII Editorial Committee Member</td>
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MONDAY, FEBRUARY 24, 2020
DAY ONE

10:15 am
Registration Opens & Networking Time at The Barings Global Headquarters, 26th Floor
Adjacent to the Kimpton Tryon Park Hotel in Charlotte, North Carolina
Arrival Snacks & Coffee Break – Special thank you to Westwood for their contribution to this break!

11:00 am
Welcome to the Winter Investment Institute 2020 & Introduction to Forum Co-Chairs
Andrea Szigethy, Founder & CEO, The Investment Institute
Donna Holly, President, The Investment Institute

Welcome & Co-Chairs’ Opening Remarks
Mark Roberts, Chief Investment Officer, Ironsides Asset Advisors
Co-Chair TBD

11:15 am
Keynote Opening Address
Navigating Global Economic Uncertainty: An Unconventional Approach
In this stimulating and entertaining talk, Dr. Mansharamani will help shed light on the underlying drivers of populism and rising protectionism as well as provide us a roadmap of how the future may unfold. He will then connect the dots to implications of his views to asset allocation decisions and long-term investing in the face of today's many cross-currents. Dr. Mansharamani is a global trend-watcher who shows people how to anticipate the future, manage risk, and spot opportunities. He first gained widespread attention with the release of his first book, *Boombustology*, which provided a framework for spotting bubbles BEFORE they burst. He’s a columnist for the PBS NewsHour and a regular contributor to Worth Magazine. The 500 million member Linkedin network listed him as the #1 Top Voice for Money, Finance and Economics for both 2015 and 2016 and Worth Magazine profiled him as one of the 100 Most Powerful People in Global Finance. In addition, he is currently a lecturer at Harvard University, and has also taught classes at Yale University on business ethics and governance, financial bubbles, and economic inequality.

Vikram Mansharamani, Ph.D., Global Trend-Watcher, Harvard University Lecturer, Portfolio Manager & Author, *Boombustology: Spotting Financial Bubbles Before They Burst*

12:15 pm
Market Update: Below Investment Grade Credit, Middle Market Lending, High Yield & Distressed Debt
Barings Speaker TBD
12:45 pm
Follow up Interview with Barings Speaker moderated by a Member of the TII Editorial Committee

1:00 pm
Networking Luncheon

2:00 pm
Keynote Address: Update on the Political Environment, Policy Themes & Outlook
This session will walk through the current political environment, policy themes which are underappreciated by financial markets, and the outlook for the next election. Importantly, Dan will walk through the specific investment implications of the different election outcomes. As is custom of Dan’s previous presentations, he will leave plenty of time for questions from the audience.
Dan Clifton, Partner & Head of Policy Research, Strategas Securities LLC

3:00 pm
Investor Portfolio Conversations – Best Investment Ideas for 2020
Each of our panelists will share what they believe to be the best performing asset classes in 2020 and their top two best investment ideas moving forward.
Moderator: Campbell Wilson, Founder & Portfolio Manager, Old Well Partners
Panelists:
Rael Gorelick, Partner & Head of Investments, Biltmore Family Office
Christopher R. Pavese, CFA, President & Chief Investment Officer, Broyhill Asset Management (BAM)
Emily Sumner, Senior Investment Manager, Gilder Office for Growth

3:45 pm
Afternoon Networking Break
Snacks & PM Coffee Break - Special thank you to KPMG for their contribution to this break!

4:15 pm
Keynote Address: Regenerative Medicine: New Approaches to Healthcare (Topic subject to change)
Anthony Atala, MD, George Link Professor and Director, Wake Forest Institute for Regenerative Medicine

5:15 pm
Day One Closing Keynote Address: A 2020 Vision of Global Opportunities & Risks
With 2020 being a big election year and potentially a debt cycle and recession year, what are some investment ideas to supercharge your eyesight for the years ahead? Mark will take you on a tour around the world to find both the global opportunities and where he sees threats in the financial markets.
Mark W. Yusko, CEO & Chief Investment Officer, Morgan Creek Capital Management

6:00 pm
End of Sessions Day One

6:15 pm to 9:15 pm
Networking Reception & Dinner Party at Merchant & Trade Rooftop Bar (Kimpton Tryon Park Hotel)
Address: 303 Church Street, Charlotte, NC 28202. Merchant & Trade is located on the 19th floor of the Kimpton Tryon Park Hotel where conference attendees are suggested to stay. There couldn’t be a more perfect restaurant and atmosphere in uptown Charlotte to bring our TII Winter Forum attendees together for a fun-filled evening of socializing and getting reacquainted with old friends or making new ones! Don’t miss this special evening where we will have the entire rooftop bar to our group at this spectacular dinner venue with panoramic views! Dress is business casual. We are truly grateful to our Winter Forum Investment Institute sponsors who have made this evening possible! We look forward to spending time with everyone!
### TUESDAY, FEBRUARY 25, 2020

#### DAY TWO

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<tr>
<th>Time</th>
<th>Event Description</th>
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<td>7:15 am - 8:30 am</td>
<td><strong>“Allocators Only” – Breakfast Meeting</strong></td>
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<td><strong>About the “Allocators Only” – Breakfast Meeting</strong></td>
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<td>This closed-door session creates the opportunity for LPs to come together to discuss the challenges they face and brainstorm solutions in an intimate, informal atmosphere. The interactive format allows time for candid conversations and enables participants to collaborate with one another. This is a great time for TII investors to reconnect or meet new investors.</td>
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<td>8:45 am</td>
<td><strong>Keynote Address:  Climate Change: What Does This Mean For Investors?</strong></td>
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<td>In this keynote address, Dr. Litterman will discuss where you should put climate change among the list of risks for investors. How serious are people taking Climate Change? Bob is the chairman of the Risk Committee at Kepos Capital LP. Prior to joining Kepos Capital in 2010, Litterman enjoyed a 23-year career at Goldman, Sachs &amp; Co., where he served in research, risk management, investments, and thought leadership roles. While at Goldman, Litterman also spent six years as one of three external advisors to Singapore’s Government Investment Corporation (GIC). Bob was named a partner of Goldman Sachs in 1994 and became head of the firm-wide risk function; prior to that role, he was co-head of the Fixed Income Research and Model Development Group with Fischer Black. During his tenure at Goldman, Bob researched and published a number of groundbreaking papers in asset allocation and risk management. He is the co-developer of the Black-Litterman Global Asset Allocation Model, a key tool in investment management, and has co-authored books including The Practice of Risk Management and Modern Investment Management: An Equilibrium Approach (Wiley &amp; Co.). Litterman earned a Ph.D. in economics from the University of Minnesota and a B.S. in human biology from Stanford University. He is also the inaugural recipient of the S. Donald Sussman Fellowship at MIT’s Sloan School of Management and serves on a number of boards, including Commonfund, the Robert Wood Johnson Foundation, the Sloan Foundation, and World Wildlife Fund.</td>
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<td><strong>Bob Litterman, Chairman, Risk Committee, Kepos Capital</strong></td>
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<td>9:30 am</td>
<td><strong>The Opportunities &amp; Challenges of Investing in Asia</strong></td>
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<td><strong>Moderator:</strong> Andrew C. Burns, Jr., Founder, Conover Investment Advisory, LLC</td>
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<td>Daniel Ward, Chief Investment Officer, Virginia Tech Foundation</td>
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<td>10:15 am</td>
<td><strong>Morning Networking Break</strong></td>
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<td>10:30 am</td>
<td><strong>Keynote Discussion: How Have You Built &amp; Implemented a Good Governance Structure?</strong></td>
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<td>This panel of seasoned fiduciaries will have an open dialogue with one another on stage surrounding the issues of good governance within their organizations. Keeping consistency in your approach to governance is always key as is the decision making process. How do you prepare for your committee meetings? How do you work with your committee members? What is the relationship like between your internal staff and the committee? How do you keep the committee focused on the right issues? What does Governance mean to a manager and what are the overall challenges? This keynote session will be co-facilitated by two former CIO’s who both have decades of experience leading Emory University and Case Western Reserve University. Our keynote panel of experts will come from different types of organizations representing a pension fund, a foundation as well as a manager.</td>
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<td><strong>Co-Facilitators:</strong></td>
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<td><strong>Panelists:</strong> Foundation TBD; Pension Fund TBD</td>
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<td>David Thomas, Founder &amp; Chief Investment Officer, Atalan Capital Partners</td>
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11:15 am
Active Investing Opportunities in Small Cap Stocks

This will be a panel of active and passive Portfolio Managers in the small capitalization equity asset class. The interactive discussion will focus on the underperformance of small cap stocks, particularly small cap value stocks, and the associated opportunities and hurdles facing portfolio managers over the next five years. This panel seeks to understand and answer the questions surrounding recent underperformance, the catalyst for future outperformance and the drivers of small cap stocks going forward. Of particular interest will be the discussion regarding the impact of computerized trading and ETFs on investing in this asset class. Daniele Donahoe, CFA will moderate the panel bringing insights from her experience as a sell-side equity analyst and small cap growth portfolio manager with Columbia Management. A very special thank you to the CFA Society North Carolina for sharing their expertise, insights and knowledge with The Investment Institute.

Moderator: Daniele M. Donahoe, CFA, CEO & Chief Investment Officer, McShane Partners
Panelists: TBD

12:15 pm
Closing Keynote Address: Are you Ready for the Second Wave of the Digital Revolution?

In the brief time since the new millennium began, we have experienced the transformative power of the first wave of the Digital Revolution as the Internet has literally changed all the rules for how the world works. Now we find ourselves on the threshold of a second wave that will be fueled by not one, but two engines, resulting in more change in the next decade than we have seen in the past twenty-five years. Discover how the Internet of Things and Blockchain technology will produce new capabilities for improving the quality of life by expanding social collaboration, preventing illness and accidents, spawning new business and product models, generating new ways to create and distribute wealth, and ending the threats of hacking and fraud. Rod Collins shows business leaders how they can ready themselves to leverage the powerful new capabilities of the second wave of the digital revolution to lead organizations that can change as fast as the world around them. Rod will leave time for a 10-minute Q&A following his presentation for TII members to ask questions.

Rod Collins, Director of Innovation, Optimity Advisors & Author of Wiki Management – A Revolutionary New Model for a Rapidly Changing and Collaborative World

1:15 pm
Closing Remarks & Conclusion of the 2020 Winter Investment Institute Forum

1:15 pm to 2:00 pm
Lunch will be provided to all attendees who RSVP in advance on their registration forms or email admin@theinvestmentinstitute.org if you would like to join other attendees, sponsors and speakers for some more informal networking time before heading home.
SPONSORING & SUPPORTING ORGANIZATIONS

THE WINTER INVESTMENT INSTITUTE FORUM
FEBRUARY 24-25, 2020
CHARLOTTE, NC

THANK YOU FOR SUPPORTING OUR MISSION FOR EDUCATION! WE ARE SO GRATEFUL FOR YOUR COLLABORATION, CONTRIBUTION & COMMITMENT TO OUR COMMUNITY!

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If you would like to support TII through a branded sponsorship (coffee breaks, receptions and dinner party at Merchant & Trade) contact Andrea Szigethy at andrea.szigethy@theinvestmentinstitute.org.

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CFA Society North Carolina

INSTITUTE FOR PRIVATE CAPITAL

ROBIN HOOD
BIOGRAPHIES

* Blue names denote TII Editorial Committee

Anthony Atala, MD, George Link Professor and Director of the Wake Forest Institute for Regenerative Medicine
Dr. Anthony Atala, George Link Professor and Director of the Wake Forest Institute for Regenerative Medicine, is a practicing surgeon and a regenerative medicine researcher. His work focuses on growing human tissues and organs using cells and 3D Printing. He is Editor-in-Chief of three journals. He is a National Academy of Medicine and National Academy of Inventors member. His work has been listed twice as Time Magazine’s top 5 medical breakthroughs of the year and he was named by Scientific American as one of the world’s most influential people in biotechnology. He has received numerous awards for his work, including the Edison Science Award, the Smithsonian Ingenuity Award, and the R&D Innovator of the Year Award. More than 14 applications of his laboratory technologies have been used clinically. He is the editor of 20 books, has published over 600 journal articles, and has applied/received over 250 national and international patents.

*David R. Brief, CFA, Senior Managing Director, Angeles Investment Advisors
David Brief is a leading expert in non-profit management with over 25 years of investment experience. David established the Jewish Federation of Metropolitan Chicago Investment Office in 2002. Under his leadership as Chief Investment Officer, the endowment portfolio evolved from a $350 million internal investment program into a $1.1 billion pool that invested assets belonging to several dozen non-profits. David has also been a leader in educating non profits on the merits of outsourced investment management. Earlier in his career, David spent eleven years as an investment consultant for three Chicago-based firms: Ibbotson Associates (now part of Morningstar Inc.), Ennis Knupp + Associates (now part of Aon Hewitt Investment Consulting, Inc.), and Capital Resource Advisors (now part of Segal Marco Advisors). Born and raised in New Jersey, David earned a BA degree in Economics from Cornell University, an MBA degree with honors from the University of Chicago, and is a CFA® Charterholder.

Andrew C. Burns, Jr., Founder, Conover Investment Advisory, LLC
Andrew has been a passionate student of the investment markets since reading his first book about Warren Buffett in college. He was most recently a member of the investment committee at Global Endowment Management (“GEM”), a leading outsourc-CIO investment firm, where he was one of two investment Principals overseeing the firm’s activities in public markets. After joining their inaugural analyst class in 2008, Andrew worked at GEM for 10 years and, during his tenure, helped the firm grow its asset base 15-fold. He left GEM to found Conover in 2018. Outside of work, Andrew is a member of the Development Committee for KIPP Charlotte, a highly successful national charter school program, and has participated extensively in the Big Brother/Big Sister program. Andrew studied Economics and History at Duke University and is a CFA® charterholder.

*Mary Cahill, President, Rivington Capital, Inc. & Former VP of Investments & CIO, Emory Investment Management
Mary L. Cahill was previously the Vice President of Investments and Chief Investment Officer of Emory University overseeing investments of all endowment, trust, operating, and employee benefit funds of the University and related medical facilities. Prior to joining Emory, Ms. Cahill was Deputy Chief Investment Officer of Xerox Corporation. Ms. Cahill has 30 years of investment experience, with prior positions including the Virginia Retirement System, SmithKline, BellSouth and Merck pension plans. Mary has overseen internal equity portfolios, invested fixed income and futures portfolios, developed performance measurement systems, and designed investment options. Mary has served as President of Pension Group East, President of Pension 21, an executive member of the Financial Executive Institute’s Committee on Investment of Employee Benefit Assets, and a member of the NYSE Pension Managers Advisory Committee. Currently, she serves as a board member of the Emory Center for Alternative Investments, The Institute For Quantitative Research in Finance, The Woodruff Arts Center, and the Robert Toigo Foundation. Mary is an advisor to the Zeist Foundation, a member of the NCAA Investment Committee, and a member of the Economic Club of New York. Mary has an MBA specializing in Finance from St. John’s University and the Chartered Financial Analyst designation.
Dan Clifton, Partner & Head of Policy Research, Strategas Securities

Daniel Clifton is a Partner and Head of Policy Research for Strategas Securities. In this capacity, Mr. Clifton evaluates government policy initiatives and its impact on the global economy and financial markets for institutional investors. Daniel and his team have been recognized by Institutional Investor magazine as one of the top Washington policy analysts in their annual survey nine consecutive years. Separately, Mr. Clifton is currently ranked as the #2 analyst on Wall Street for Accounting & Tax Policy in the same survey. Prior to joining Strategas, Mr. Clifton was Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders. In this capacity, Daniel was part of coalitions that successfully lowered capital gains and dividend tax rates to 15 percent, a repatriation tax holiday on foreign source revenue in 2004, and reform of the nation’s private-sector pension system. Prior to joining ASA, Mr. Clifton was Federal Affairs Manager for Americans for Tax Reform and served as a senior staff member in two gubernatorial administrations working on economic and fiscal policy issues. Daniel has also worked in various capacities on elections at federal, state, and local levels. Mr. Clifton received both his BA in Urban Planning and his MS in Public Policy from Rutgers University where he was a Fellow at the Eagleton Institute of Politics and a Harold Martin Fellow for Public Policy.

Rod Collins, Director of Innovation, Optimity Advisors & Author of Wiki Management – A Revolutionary New Model for a Rapidly Changing and Collaborative World

Rod Collins serves in the dual capacity as the Director of Innovation at Optimity Advisors, a global strategy consulting firm, and as the Innovation Curator at Salt Flats, a unique innovation ecosystem for creating growth in a rapidly changing world. Rod is a leading expert on the future of business and a regular blog contributor to Management-Issues.com. He is also the author of Wiki Management: A Revolutionary New Model for a Rapidly Changing and Collaborative World, which highlights the innovative tools and practices used by a new breed of business leaders to sustain extraordinary performance in a world reshaped by digital disruption.

*Michael Condon, Head of Portfolio Management, Fund Evaluation Group (FEG)*

Michael (Mike) A. Condon, CFA is Senior Vice President of Institutional Investments at Fund Evaluation Group, LLC (FEG). Condon works with Endowment and Foundation (E&F) clients within FEG’s outsourced chief investment officer (OCIO) service. A long-time thought leader within the E&F space, Condon brings more than 20 years of experience as an acting CIO. Most recently as CIO at Southern Methodist University, he led a 15-person office and was responsible for all aspects of investing the university’s $1.5 billion endowment. As CIO for the University of Arkansas Foundation, Condon oversaw a $1.1 billion endowment. During his 10-year tenure at Georgia Tech, the foundation endowment grew from $440 million to $1.5 billion. Additionally, Condon is on the Editorial Committee for The Investment Institute, and on advisory Boards for Institutional Investor and Alternative Investment Management, LLC.

*Celia Dallas, Chief Investment Strategist, Cambridge Associates*

As Chief Investment Strategist for Cambridge Associates and a Managing Director of the firm, Celia is responsible for formulating our global investment strategy and portfolio construction advice. Since joining Cambridge in 1996, Celia has contributed to a wide range of research initiatives, including serving as one of the main architects of our Risk Allocation Framework and an author of the related report. She is the author of our quarterly publication, VantagePoint, in which she shares our house view and advice. Celia is a regular contributor to other research publications, covering a wide range of capital market, asset allocation, and investment planning topics. She is a frequent presenter and discussion moderator at the firm’s roundtables and various industry conferences. Before joining Cambridge Associates, Celia was a consultant for Harlan Brown & Co, a competitive intelligence consulting firm. In this position, she researched, wrote, and presented market analysis commissioned by Fortune 500 clients on a variety of consumer and industrial products. She also worked for the Employee Benefit Research Institute (EBRI), where she conducted research and wrote reports on retirement income security issues. Celia has an MBA from the Darden School of Business, University of Virginia and a BA from University of Pennsylvania.

*Daniele M. Donahoe, CFA, CEO & Chief Investment Officer, McShane Partners*

Daniele Donahoe currently serves as Managing Partner and Chief Investment Officer of McShane Partners Wealth & Investment Advisory where she is the majority shareholder. She came to the firm in May 2010 as a Portfolio Manager and by January of 2014, assumed part ownership of the firm while overseeing the investment platform for the firm’s $550 million in AUM. Prior to Rinehart, Daniele was with Columbia Management Group, previously owned by Bank of America, where as a Senior Portfolio Manager she co-managed the Columbia
Small Cap Growth II fund. Before Columbia Management, Daniele served as an Associate Analyst on an Institutional Investor Magazine Ranked Equity Research Team following the Enterprise Software Industry at Salomon Smith Barney (Citigroup) in New York. She has also served as an associate at Thomas Weisel Partners in San Francisco, CA and J.C. Bradford in Nashville, TN. Throughout her career, Daniele has focused on equity research across a broad range of industries ranging from multi-billion dollar corporations to small and micro capitalization equities. Daniele has successfully applied her experience working at full service brokerage firms, her time on Wall Street and her experience managing an $550 million fund, to grow and initiate change at McShane Partners. She has not only lead the firm’s investment philosophy, but also lead the firm’s growth with business development initiatives and sophisticated software implementations. She has brought together a strong investment team with in-house proprietary research functionalities and architected research templates for manager due diligence and stock selection. Daniele has co-authored industry publications such as B2B eCommerce: A Vertical and Horizontal Perspective and E2E Commerce: How the Internet Redefines Enterprise Software and continues to write research whitepapers on topics ranging from ETFs, fixed income and alternative assets. She is a frequent speaker in Charlotte news outlets, including the Charlotte Business Journal and Charlotte Observer, as well as national publications such as the Wall Street Journal and Bloomberg. Within the past few years, Daniele has focused her efforts on educating women through a series of events called “Wealth, Wine and Women,” as well as educating the broader community with panel presentations, luncheons featuring economic overviews, and monthly newsletters. She is an endless wealth of ideas, energy and change.

*Jim Dunn, Chief Executive Officer & Chief Investment Officer, Verger Capital Management
As Verger’s Chief Executive and Chief Investment Officer, Jim oversees all investment decisions and is responsible for setting the course for the company, leading our corporate strategy and ensuring that Verger remains competitively positioned to serve our partners’ needs in an increasingly complex and volatile market environment. Previously, Jim was Vice-President and Chief Investment Officer at Wake Forest University, responsible for investment of the University’s endowment, working capital and life income assets of over $1.4 billion. Prior to joining Wake Forest, Jim served as Managing Director at Wilshire Associates Inc., and Chief Investment Officer and Portfolio Manager for Wilshire Funds Management, the money management arm of Wilshire Associates. At Wilshire, Jim was responsible for providing leadership on asset allocation, investment policy and investment manager selection. Jim served as the Chairman of the Wilshire Funds Management Investment Committee and served as Portfolio Manager for all of Wilshire Fund Management’s alternative investment portfolios. Jim holds a BBA in Finance from Villanova University, where he was a member of the NCAA Division I men’s varsity soccer team. He is married and the father of two boys. He currently serves as a member of the Board of Directors of the Wells Fargo Global Alternative Investments, ASGI Agility Income Fund and the ASGI Corbin Multi-Strategy Fund, LLC. Jim also sits on the CAPTRUST Advisory Board, the North Carolina Investment Institute Editorial Committee, the CFA North Carolina Society’s Strategic Advisory Board, SEI Canada Independent Review Committee, Villanova President’s Advisory Council and serves as the Treasurer of James Denmark Loan Fund.

*Robert Durden, CEO/CIO, University of Virginia Investment Management Company (UVIMCO)
Robert Durden is the CEO/CIO of University of Virginia Investment Management Company (UVIMCO). He was previously a Senior Vice President and the Chief Investment Officer at Texas Children’s Hospital. Prior to joining Texas Children’s Hospital in March 2013, Robert was the Managing Director of Private Investments at Morgan Creek Capital Management. There he directed $4.5 billion of private investments across private equity, energy and natural resources, and real estate. Mr. Durden has also worked with Legg Mason/Western Asset Management, Ritchie Capital Management, and Merrill Lynch’s Middle Market M&A group. Robert received her MBA in finance and entrepreneurship, with honors, from the University of Chicago Booth School of Business and his Bachelor of Arts in economics, magna cum laude, from Princeton University. Robert Durden primarily oversees the Texas Children’s Hospital Foundation and other investment assets, totaling approximately $2.7 billion.

*Vanita Gaonkar, Investment Officer, Robert Wood Johnson Foundation
Vanita W. Gaonkar is an Investment Officer with the Robert Wood Johnson Foundation, focused on Public Investments. Prior to joining the Foundation, Vanita was the Director of Research at Ehrenkranz Partners, L.P., where she was responsible for investments across asset classes, including fixed income, equities, hedge funds, private equity and real assets. Before joining Ehrenkranz Partners, L.P. she served as a Director in Alternative Investments at Credit Suisse, where she oversaw investments in long/short equity, event driven credit and emerging markets. Prior to Credit Suisse she worked as an analyst at The Blackstone Group and J.P. Morgan Chase. Ms. Gaonkar earned her B.A. in Mathematics and Economics from Wesleyan University, Middletown, Conn.

*Susanne Gealy, Senior Director - Investments, Dignity Health
Susanne Gealy is a Senior Director of the investments team at Dignity Health based in San Francisco. She leads the organization’s public and hedge fund equity investments. Dignity Health is one of the largest health systems in the US, dedicated to providing quality, compassionate health care. The organization has an $11 billion investment portfolio, allocated across the long term strategic goals, retirement benefits, endowment, and insurance. Prior to joining Dignity Health, Susanne spent 10 years at the Teacher Retirement System of Texas, in Austin, a $150 billion retirement plan. At TRS, she was responsible for the $26 billion external equity investment program comprising US, international, emerging markets, and global equity managers. Before joining TRS, Susanne worked in New York at Investcorp, Lazard Asset Management, a family office, and Banc of America Securities. She began her career in finance at JP Morgan in equity derivatives. Prior to attending business school, Susanne worked in the field of structural engineering in San Francisco. Susanne holds an M.B.A. from the University of Chicago’s
Libby George, Director of Investments, NC State University

Libby George is currently the Director of Investments at North Carolina State University and has over 25 years of experience in investment management, corporate, educational, and financial accounting. Prior to becoming Director of Investments, Ms. George was the Manager of Financial Reporting where she was responsible for the financial reporting, capital assets, cash management, debt, and taxes of North Carolina State University. Libby currently manages over $1.2 billion in short term, operating, charitable giving, traditional long-term endowment assets as well as long-term endowment assets invested in a socially responsible manner. Ms. George previously served on the State of North Carolina’s Supplemental Retirement Board of Trustees as appointed by Governor Beverly Perdue in July 2009 and was the Chair of the Investment Subcommittee of the Supplemental Retirement Board. Libby is involved in the community through her church in various capacities such as Wake Interfaith Hospitality Network and past chair of the Permanent Endowment Committee. She received her Bachelor of Science degree in Accounting from Auburn University and was an NCAA athlete in Swimming for the Auburn Tigers. She became a Certified Public Accountant in 1992.

Patricia J. Gerrick, Chief Investment Officer, Progress Investment Management Company

Pat is responsible for directing all of Progress’ investment activities. She serves on the firm’s Management Committee and chairs its Investment Committee. She most recently served as Howard University’s Chief Investment Officer through a customized outsourced relationship, overseeing both endowment and pension assets. Prior to that, Pat served as the Deputy Treasurer and Chief Investment Officer for the State of North Carolina, where she was responsible for the investment platform across all asset classes, investment team structure and development, and performance of pension assets, defined contribution investments and short term cash. During that time, she also served as a member of the Virginia Retirement System’s Investment Advisory Committee. Prior to her role in North Carolina, Pat was the first Chief Investment Officer for the Indiana Public Employees’ Retirement System. She has also held investment officer positions with the New York State Common Retirement Fund, the Kansas City, Missouri Pension System, and within Treasury for the Sprint Corporation. Pat holds an M.B.A. from Columbia University and a B.S. in Economics from Fisk University.

David Gilmore, Managing Director, The Harry and Jeanette Weinberg Foundation

David Gilmore joined The Harry and Jeanette Weinberg Foundation in 2014 to help build the investment office. The Foundation has $2.2 billion in assets and makes over $100 million in grants each year. David is responsible for the design and implementation of the Foundation’s asset allocation, investment manager selection and risk management. Prior to joining the Foundation, David served in several senior roles at The Ohio State University investment office which managed $3.5 billion. David was previously a partner at Gerber/Taylor Capital Advisors. David earned his BBA from Baylor University and an MBA with a concentration in Finance from the University of Memphis. David holds the Certified Financial Planner™ professional (CFP®) designation and the Chartered Alternative Investment Analyst (CAIA) designation.

Rael Gorelick, Partner & Head of Investments

Rael oversees the firm’s investment strategy, investment due diligence, and sourcing, and works closely with our portfolio managers in the construction and allocations of our families’ portfolios. Prior to joining Biltmore Family Office, Rael was a co-founder of Gorelick Brothers Capital, a firm with a strong industry reputation for due diligence and thematic investing and winner of multiple industry awards for both their hedge fund and real estate efforts. Since 2005, Rael has led groups of top US family office executives in sourcing investment managers, successfully identifying winning themes at an early stage. From 2001 to 2003, he served as a senior marketing and business development consultant for Atlantic Assurance Group. Previously, Rael served as manager of distribution strategy for Showtime Networks Inc. Rael is a 1994 graduate of Northwestern University.

Mike Hennessy, Managing Director, Morgan Creek Capital Management

Mike Hennessy is a Co-founder of Morgan Creek Capital Management, and serves as the Director of Investments. In this role, Mr. Hennessy provides oversight to the Private Investments Group, and acts as a Portfolio Strategist on portfolios beyond private investments, including work with Morgan Creek’s advisory clients and proprietary funds. Prior to joining Morgan Creek in 2004, Mr. Hennessy was Vice President and a founding member of UNC Management Company. Primary areas of responsibility included domestic equity, international and emerging markets equity, opportunistic equity, absolute return, fixed income, enhanced fixed income and private investments. Mr. Hennessy also assisted in developing overall investment objectives as well as strategic and tactical asset allocation for the funds. Mr. Hennessy was responsible for monitoring both public and private individual managers and overall portfolio performance, as well as risk management. Prior to joining UNC in 1999, Mr. Hennessy was an Investment Director at Duke Management Company (Duke University) where he assisted in the management of multi-billion portfolios across all asset classes of various University-related investment pools. Before joining Duke in 1991, Mr. Hennessy was an Associate at Amundi Smith Breeden Associates, a quantitative investment management firm based in Durham, NC. Mr. Hennessy received his Master of Business Administration with a concentration in Finance from the Fuqua School of Business at Duke University and he also holds a Bachelor of Science Degree in Philosophy, Psychology and Mathematics from the College of William and Mary. Mr. Hennessy is Treasurer of Duke University Federal Credit Union, a member of the Investment Committee at the Carolina Friends School, a director of the Morgan Creek Foundation, Emeritus Trustee of the College of William & Mary Foundation Board of Trustees, and former
Markets in Princeton, NJ and interned at Brown Advisory in Baltimore, MD. He received an M.B.A. from Duke University, an M.S. from as an Investment Manager at DUMAC, the investment office for Duke University. Earlier in his career, he worked at Bloomberg Financial Markets in Princeton, NJ and interned at Brown Advisory in Baltimore, MD. He received an M.B.A. from Duke University, an M.S. from Clemson University, and a B.A. from Rutgers University. He is also a CFA charterholder and serves on the Board of the Woodlawn School and The Pines at Davidson. Ray lives in the town of Davidson with his wife and four children.

Ray Jacobson is the Chief Investment Officer at Davidson College, a highly selective independent liberal arts college for 1920 students located 20 minutes north of Charlotte, NC. Ray joined the college in the summer of 2008 and oversees all aspects of the college’s $800+ million endowment. Prior to Davidson, he served as the first investment officer for the Golden LEAF Foundation, a nonprofit established to increase economic opportunities in North Carolina’s rural and tobacco-dependent communities. Mr. Jacobson began his endowment career in 2001 as an Investment Manager at DUMAC, the investment office for Duke University. Earlier in his career, he worked at Bloomberg Financial Markets in Princeton, NJ and interned at Brown Advisory in Baltimore, MD. He received an M.B.A. from Duke University, an M.S. from Clemson University, and a B.A. from Rutgers University. He is also a CFA charterholder and serves on the Board of the Woodlawn School and The Pines at Davidson. Ray lives in the town of Davidson with his wife and four children.

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Dr. Vikram Mansharamani is a global trend-watcher who shows people how to anticipate the future, manage risk, and spot opportunities. He first gained widespread attention with the release of his first book, Boombustology, which provided a framework for spotting bubbles BEFORE they burst. Since then, he has been a frequent commentator on issues driving disruption in the global business environment. He’s a columnist from Yale University, where he was elected to Phi Beta Kappa.

Bob Litterman is the chairman of the Risk Committee at Kepos Capital LP. Prior to joining Kepos Capital in 2010, Litterman enjoyed a 23-year career at Goldman, Sachs & Co., where he served in research, risk management, investments, and thought leadership roles. While at Goldman, Litterman also spent six years as one of three external advisors to Singapore’s Government Investment Corporation (GIC). Bob was named a partner of Goldman Sachs in 1994 and became head of the firm-wide risk function; prior to that role, he was co-head of the Fixed Income Research and Model Development Group with Fischer Black. During his tenure at Goldman, Bob researched and published a number of groundbreaking papers in asset allocation and risk management. He is the co-developer of the Black-Litterman Global Asset Allocation Model, a key tool in investment management, and has co-authored books including The Practice of Risk Management and Modern Investment Management: An Equilibrium Approach (Wiley & Co.). Litterman earned a Ph.D. in economics from the University of Minnesota and a B.S. in human biology from Stanford University. He is also the inaugural recipient of the S. Donald Sussman Fellowship at MIT’s Sloan School of Management and serves on a number of boards, including Commonfund, the Robert Wood Johnson Foundation, the Sloan Foundation, and World Wildlife Fund.

Vikram Mansharamani, Global Trend-Watcher, Harvard University Lecturer, & Portfolio Manager, Author, Boombustology

Bob Litterman, Chairman, Risk Committee, Kepos Capital

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Muthu is the Chief Investment Officer at Group Health Foundation. Prior to Group Health Foundation, Muthu was responsible for the investment strategy, analysis, and manager selection within the Private Equity and Natural Resources portfolios for Emory Investment Management. The Private Equity portfolio includes buyout, growth and distressed investments and Natural Resources is a diversified portfolio of energy, timber, real estate, and commodities. Prior to joining Emory, he was Head of Private Markets and oversaw the private market portfolio at Covariance Capital Management, an outsourced CIO firm that invests on behalf of endowments and foundations. Prior to Covariance, he was an Associate Director of Investments at Spider Management Company, the University of Richmond’s investment management company, where he led strategy and manager selection for private equity, real estate and all asset classes within emerging markets. His background also includes time as a Portfolio Manager at the Florida State Board of Administration and a Senior Analyst at RSM Equico. Muthu has a BHM from Mangalore University and an MBA from Rollins College.

Muthu Muthiah, Chief Investment Officer, Group Health Foundation

Vikram Mansharamani is a global trend-watcher who shows people how to anticipate the future, manage risk, and spot opportunities. He first gained widespread attention with the release of his first book, Boombustology, which provided a framework for spotting bubbles BEFORE they burst. Since then, he has been a frequent commentator on issues driving disruption in the global business environment. He’s a columnist from Yale University, where he was elected to Phi Beta Kappa.

*Dan Parker, Deputy Chief Investment Officer, Texas Tech University System

Dan Parker is the Deputy Chief Investment Officer for Texas Tech University, and is based in Austin, Texas. In this role, he shares broad responsibility for policy, strategy, asset allocation, structure and processes across the organization and the portfolio, in addition to driving the endowment’s investments in public and private equity, diversifying and absolute return strategies, real assets and natural resources.
Before relocating to Austin to join Texas Tech, Dan worked in New York as an Investment Officer with Helmsley Charitable Trust, as a Vice President in private equity with BlackRock and as an Associate in investment banking at Citigroup. He began his career serving as a US Marine, where he commanded infantry and reconnaissance units. He holds degrees from Tulane University and The College of William and Mary.

Christopher R. Pavese, CFA, President & Chief Investment Officer, Broyhill Asset Management (BAM)
Chris serves as President & Chief Investment Officer of Broyhill Asset Management. He leads the firm’s research and investment process, focused on idea generation, investment strategy, and portfolio construction. Chris has nearly two decades of investing experience. In addition to his role at BAM, Chris serves as Vice President & Chief Investment Officer of BMC Fund and the Broyhill Family Foundation. Chris began his career at JPMorgan where his work straddled JPMorgan Investment Management and JPMorgan Private Bank. He is a CFA Charterholder, Past President of the Board of the CFA Institute’s North Carolina Society, and current member of the CFA North Carolina Society Strategic Advisory Board. Chris is an official southerner-in-training and understands the importance of sweet tea and the multiple meanings of “bless your heart.”

Mark E. Roberts, CFA, Chief Investment Officer, Ironsides Asset Advisors (Winter Forum Co-Chair)
Mark E. Roberts, CFA serves as the Chief Investment Officer for Ironsides Asset Advisors, LLC, as well as a Managing Director for the Tuscarora Company (a family office). Immediately preceding that, Mr. Roberts was the Director of Global Equities and Hedged Strategies for the North Carolina Retirement Systems where he and his team were responsible for the management of the $33 billion Global Equity and Hedge Fund portfolios for the State of North Carolina. Additionally, Mr. Roberts has served as Chief Investment Officer for families and provided consulting services for endowments and foundations in both asset allocation, manager due diligence and portfolio construction. Earlier in his career, Mr. Roberts served as Director of Risk Management for Centura Bank and had asset – liability management responsibilities. Mr. Roberts received his Master of Science degree in finance from Virginia Commonwealth University and a Bachelor of Science degree from the Calloway School of Business at Wake Forest University. Mr. Roberts serves on the Wake Forest Institute for Regenerative Medicine Philanthropic Committee. Ms. Sill serves as the Chief Investment Officer for Ironsides Asset Advisors, LLC, as well as a Managing Director for the Tuscarora Company (a family office). Immediately preceding that, Mr. Roberts was the Director of Global Equities and Hedged Strategies for the North Carolina Retirement Systems where he and his team were responsible for the management of the $33 billion Global Equity and Hedge Fund portfolios for the State of North Carolina. Additionally, Mr. Roberts has served as Chief Investment Officer for families and provided consulting services for endowments and foundations in both asset allocation, manager due diligence and portfolio construction. Earlier in his career, Mr. Roberts served as Director of Risk Management for Centura Bank and had asset – liability management responsibilities. Mr. Roberts received his Master of Science degree in finance from Virginia Commonwealth University and a Bachelor of Science degree from the Calloway School of Business at Wake Forest University. Mr. Roberts serves on the Wake Forest Institute for Regenerative Medicine Philanthropic Advisory Board. Mr. Roberts is the past Chairman of the Board for the NC State Investment Fund and still serves on the fund’s board. He is a member of the North Carolina Society of Financial Analysts and the American Finance Association. Mr. Roberts has served on multiple non-profit boards.

Anne Shelton, Chief Investment Officer, American Trading and Production Corporation (Atapco)
Anne Shelton joined Atapco, a multi-generational single family investment company, as Chief Investment Officer in July 2017. Previously, Ms. Shelton was Deputy Chief Investment Officer of American Red Cross and led the team investing in all types of alternative investments including private equity, distressed debt, real estate, real assets, and hedge funds. Prior to working at American Red Cross, Anne was Director of Absolute Return at Cornell University and worked at McKinsey in the Corporate Finance and Strategy Practice. Anne serves on the board and finance/investment committee of YWCA National Capital Area. A CFA charterholder, Anne is active in the CFA Society of Washington DC where she has served as a board member, on the programming committee, on the nominating committee, and currently serves on the finance committee. Anne earned a B.S. with distinction in Operations Research & Industrial Engineering from Cornell University and a M.B.A. with distinction in Finance and Marketing from New York University Stern School of Business.

Valerie J. Sill, President & CEO, DuPont Capital Management
Valerie J. Sill, CFA, CAIA is President and CEO of DuPont Capital Management (DCM) and serves as its Chief Investment Officer. She is responsible for overseeing the investment of more than $25 billion in assets held by DuPont Company plans and external clients. DCM manages assets across nine different asset classes using a value-based investment approach that combines valuation and risk control disciplines designed to produce risk-efficient excess returns that satisfy its clients’ investment objectives. Prior to joining DCM in April 2004, Ms. Sill was Executive Vice President at The Boston Company. There she chaired the Equity Policy Group and was the Director of Large Cap Value strategies. She was a dual officer with Dreyfus, also a Mellon company, where she managed the Dreyfus Premier Core Value mutual funds. In addition to her work at The Boston Company and Dreyfus, Ms. Sill formed and chaired Mellon’s Research Forum to foster collaboration among investment professionals from each of Mellon’s investment management subsidiaries. Ms. Sill started her career in asset management with State Street Research & Management Company as a Health Care and Utilities analyst and later joined Investment Advisors in Minneapolis as a senior analyst. Ms. Sill is a member of the Board of Trustees of Longwood Gardens and chairs its Investment Committee. Ms. Sill is a Trustee of the Christiana Care Health System and chairs its Investment Committee. Ms. Sill served a three-year term on the Federal Reserve Bank of Philadelphia’s Economic Advisory Council. Ms. Sill was awarded a Bachelor of Arts degree, *magna cum laude*, in Economics and Philosophy from Wellesley College. She was elected to Phi Beta Kappa and was a Durant Scholar. She holds an MBA from Harvard University and was awarded both the CFA and CAIA charters.

Donna L. Snider, Managing Director, Kresge Foundation
Ms. Snider joined The Kresge Foundation in 2009. Donna has responsibility for evaluating investment opportunities across all asset classes as well as oversight for the internal trading activity. Prior to joining Kresge, Donna was a director in the Global Markets and Investment Banking division of Merrill Lynch in New York. During her seven years with Merrill Lynch, she covered institutional investors for structured credit, rates and equity products, as well as corporate issuers for their balance sheet hedging activity. Prior to Wall Street, Donna was a pension actuary with Towers Perrin (now Towers Watson) in Chicago. Donna is a member of the board of the Presbyterian Villages of Michigan.
investing with The Beacon Group and J.P. Morgan Partners and in investment banking with J.P. Morgan Securities. David received his MBA from Stanford University's Graduate School of Business where he was an Arjay Miller scholar and his BA summa cum laude from Duke University where he dual majored in Economics and International Studies.

Sally Staley, Trustee & Chair of Investment Committee, The College of Wooster & Former CIO, Case Western Reserve University
Sally Staley is a board member, investment committee leader and advisor to institutional asset owners and investment managers. She served in 2017 from Case Western Reserve University where she had worked for 15 years, serving since 2006 as CIO for $3 billion of endowment and retirement plan assets. She began her financial career in international bond market research and sales with Salomon Brothers and Merrill Lynch and transitioned to investment management at the State of Wisconsin Investment Board where she established an international fixed income program and managed an international bond portfolio. Sally later worked as Senior Consultant with the investment management consulting practice of PricewaterhouseCoopers. She holds a Master of International Affairs degree from Columbia University and a Bachelor of Arts degree from The College of Wooster where she graduated Phi Beta Kappa. She has been a member of Wooster’s board of trustees since 2006, currently chairing the investment committee and serving on the finance, governance, and executive committees. She is also a board member and investment subcommittee chair for Great Lakes Theater Festival Inc., a member of the advisory committee of the Certified Investment Fund Director Institute, and a former board member and investment committee chairperson for the Saint Luke’s Foundation of Cleveland.

Mark Steed, Chief Investment Officer, Arizona PSPRS Trust
Mark Steed is Chief Investment Officer for Arizona PSPRS, a public pension plan with approximately $9 billion in AUM. Over the last 10 years at Arizona PSPRS, Mr. Steed has managed Private Equity, Venture Capital, Absolute Return, Opportunistic Credit, Public Equity, Global Trading Strategies and Real Estate portfolios. His creative approach and notable performance across disparate asset classes won him recognition as a “Rising Star” by Money Management Magazine and, later, “Asset Allocator of the Year” by Institutional Investor. Mr. Steed recently concluded a four-year stint as a forecaster for the distinguished Good Judgment Project, led by Dr. Phil Tetlock at UPenn, and recently published the first guest-post on the popular decision science blog Farnam Street. Prior to Arizona PSPRS, Mr. Steed worked in Banking at JPMorgan Chase. Mr. Steed graduated with a Masters of Science degree in Predictive Analytics from Northwestern University. He also has an MBA from Thunderbird’s School of Global Management (Jost Henkel Scholar) and received his BA (with honors from Sigma Iota Rho) in Latin American Studies and Business Management from Brigham Young University.

Emily Sumner, Senior Investment Manager, Gilder Office for Growth
Emily serves as the Senior Investment Manager for Gilder Office for Growth where she provides oversight and guidance in managing and coordinating all aspects of the family office’s investment activities and strategies. Prior to joining Gilder Office for Growth, Emily served as an Investment Officer for Oklahoma State University’s Foundation where she worked to lead the efforts in building the private equity portfolio for the Foundation. Prior to her role as an Investment Officer, she was a Vice President at Hatteras Funds within the investment management group focusing on alternative investments in hedge funds and private equity funds. Emily received her Bachelor of Arts degree from Randolph Macon College with majors in both Business/Economics and Accounting. Emily also obtained her Master of Business Administration degree with a concentration in finance from the University of North Carolina, Kenan-Flagler Business School. Emily has also earned her designation as a chartered alternatives investment analyst (CAIA) and as a chartered financial analyst (CFA).

David Thomas, Founder & Chief Investment Officer, Atalan Capital Partners
David Thomas is the Founder and Chief Investment Officer of Atalan Capital Partners. Founded in 2015, Atalan Capital Partners is a long/short equity manager based in New York that employs a research-intensive, fundamentally-oriented, value-driven strategy with the goal of building a concentrated, highly-liquid portfolio of “best ideas/biggest asymmetries” across all major sectors and geographies. Atalan seeks to identify long and short investments primarily in equity and debt securities issued by U.S. and non-U.S. publicly-traded companies as well as opportunistic investments in other liquid asset classes. Atalan uses a disciplined investment process that aims to identify and capitalize on recurring investment patterns to compound capital over the long term while seeking to minimize the risk of impairment. David’s 19 years of investment experience spans multiple sectors, geographies, and asset classes (including equity long/short, credit, distressed, private equity, and commodities). Prior to founding Atalan, David was an investment analyst with Soroban Capital Partners, an equity long/short hedge fund. Before joining Soroban, he was a partner and sector head with Highside Capital Management, an equity long/short hedge fund. Prior to Highside, David was a portfolio manager with Perry Capital, a global multi-strategy hedge fund. David began his career in private equity investing with The Beacon Group and J.P. Morgan Partners and in investment banking with J.P. Morgan Securities. David received his MBA from Stanford University’s Graduate School of Business where he was an Arjay Miller scholar and his BA summa cum laude from Duke University where he dual majored in Economics and International Studies.

Raj Venkatesan, Founder and Chief Investment Officer, Trinity Alps Capital Partners
Raj Venkatesan is the founder and chief investment officer of Trinity Alps Capital Partners, an institutional investment management firm based in San Francisco, California. Raj founded Trinity Alps in 2017 in order to utilize two decades of global investment experience and expertise as the sole portfolio manager of the firm’s Global Focused Equity strategy. Armed with a degree in Political Economics and Asian
Studies from Williams College, Raj began his career at JP Morgan in 1992 as an investment analyst working in Asia and New York City. From 1995-1997, Raj attended Harvard Business School and earned an MBA. After business school Raj spent the next 19 years at Standard Pacific Capital, a long/short equity hedge fund in San Francisco. Raj joined Standard Pacific as an analyst in 1997, was the sole portfolio manager of both the Japan Fund (2004-2016) and Asia Fund (2007-2016), and was also the co-portfolio manager of the firm’s flagship Global Fund from 2005-2016. Raj lives in San Francisco with his wife and two sons. He is an active member of the community and supports several non-profits and educational institutions. He enjoys fly fishing, baseball and traveling.

*Daniel Ward, Chief Investment Officer, Virginia Tech Foundation*

Mr. Ward joined the Virginia Tech Foundation in April 2008 where he serves as its Chief Investment Office - Endowment. He leads all aspects of managing the Foundation’s portfolio including manager and investment selection and setting asset allocation policy. Almost 50% of the portfolio is invested internationally including a mix of niche and direct investments. The Virginia Tech endowment performance consistently ranks in the top 25% of its peers and was honored by Institutional Investor as the top mid-sized endowment of 2011. The Foundation currently oversees approximately $1.7 Billion in operating funds and long-term endowment funds which support Virginia Tech University. Prior to joining Virginia Tech he was the director of research for Integritas Advisors, a family office, from July 2004 – April 2008. Mr. Ward holds a BBA from The University of Michigan Business School, a MBA from The University of Florida Warrington College of Business and is a CFA charterholder.

Stephen Johansen, Chief Investment Officer, Waypointe

Stephen Johansen is the CIO of Waypointe. Stephen has lived in mainland China and Hong Kong since 2004, and founded Waypointe in Hong Kong in 2012. Stephen is American, a native of California and speaks Mandarin Chinese.

Campbell Wilson, Founder & Portfolio Manager, Old Well Partners

Campbell is the Founder and Portfolio Manager at Old Well Partners. Previously he was a Managing Director and Head of Public Investments at Global Endowment Management, where he worked from 2007-2015. Campbell started his career on the investment team at Duke University and is a graduate of the University of North Carolina at Chapel Hill, where he was also the co-founder of an Internet company, Bradnadeals.com. He currently serves on the board of KIPP Charlotte, a public charter school for children in underserved communities in Charlotte.

*Mark W. Yusko, CEO & Chief Investment Officer, Morgan Creek Capital Management*

Mark Yusko is the Founder, CEO and Chief Investment Officer of Morgan Creek Capital Management. Prior to forming Morgan Creek, Mr. Yusko was President, Chief Investment Officer and Founder of UNC Management Company, the Endowment investment office for the University of North Carolina at Chapel Hill, from 1998 to 2004. Throughout his tenure, he directly oversaw strategic and tactical asset allocation recommendations to the Investment Fund Board, investment manager selection, manager performance evaluation, spending policy management and performance reporting. Total assets under management were $1.5 billion ($1.2 billion in endowment assets and $300 million in working capital). Until 1998, Mr. Yusko was the Senior Investment Director for the University of Notre Dame Investment Office where he joined as the Assistant Investment Officer in October of 1993. He worked with the Chief Investment Officer in all aspects of Endowment Management. Mr. Yusko received his Bachelor of Science Degree, with Honors, in Biology and Chemistry from the University of Notre Dame and a Master of Business Administration in Accounting and Finance from the University of Chicago. Mr. Yusko is an Advisory Board member of a number of private capital partnerships and alternative investment programs and has served as a consultant on alternative investments to a select group of institutions. Mr. Yusko is an Investment Committee member of the MCNC Endowment, a member of the DukeEngage National Advisory Board at Duke University, President and Chairman of the Investment Committee of The Hesburgh-Yusko Scholars Foundation at the University of Notre Dame, and President and Head of Investment Committee of the Morgan Creek Foundation.
ABOUT
The Winter Investment Institute Forum is dedicated to bringing senior investment professionals together for face-to-face, high-level conversations that spark ideas and opportunities in this ever-changing investment environment. The program is committed to providing a unique educational and network association for senior-level decision-makers from leading endowments, foundations, pension funds, family offices/high net worth individuals, asset management firms, consultants, financial advisory firms and other investment firms. The Winter Forum will educate its participants on the latest developments and trends in the financial marketplace.

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Registration for our new Winter Investment Institute Forum is open to both current members and non-members of The Investment Institute (TII). Registration is available on a first-come-first-served-basis with limited seating for up to 150 attendees. Discounted registration fees will be available from now until November 1. After Nov. 1, the rates to attend will increase. If you are not a TII member but are interested in learning more about joining our annual membership subscription, please visit www.theinvestmentinstitute.org or send us an email at admin@theinvestmentinstitute.org.

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Please visit our website at www.theinvestmentinstitute.org and click the “Register” button in the green Winter Forum box near the top of the screen.

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Barings Global Headquarters
(Adjacent to the Kimpton Tryon Park Hotel)
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(Open to Current Members & Non-Members)

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Discounted registration fees available for current TII Members.

The Spring Investment Institute Forum
May 18-19, 2020
The Carolina Inn
Chapel Hill, NC
(Membership Required to Attend – To Join, Visit our Website)

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October 26-27, 2020
The St. Regis Hotel
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