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

FOR MORE INFORMATION ON JOINING OUR COMMUNITY:
WWW.THEINVESTMENTINSTITUTE.ORG
INTRODUCTION TO THE INVESTMENT INSTITUTE

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

ANDREA SZIGETHY  DONNA HOLLY
Founder & CEO  President

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.

www.TheInvestmentInstitute.org
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. & Investment Committee, The Woodruff Arts Center, Community Foundation for Greater Atlanta & Zeist Foundation

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 & CIO Morgan Creek Capital Management and Managing Partner, Morgan Creek Digital Assets
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<td>Chairman, Risk Committee</td>
<td>Kepos Capital</td>
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<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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<td>Broyhill Asset Management (BAM)</td>
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<td>Matthew Reive</td>
<td>Principal, Co-Portfolio Manager</td>
<td>Adirondack Funds</td>
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<td>Cathleen M. Ritterreiser</td>
<td>Executive Director</td>
<td>Commonfund Institute/Winter Forum Co-Chair</td>
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<td>Mark Roberts</td>
<td>Chief Investment Officer</td>
<td>Ironsides Asset Advisors/Winter Forum Co-Chair</td>
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THE WINTER INVESTMENT INSTITUTE FORUM  
FEBRUARY 24-25, 2020  
CHARLOTTE, NORTH CAROLINA  
(Open to Non-Members & Current Members)

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

SPECIAL THANK YOU TO WESTWOOD FOR YOUR CONTRIBUTION TO OUR ARRIVAL SNACKS & COFFEE 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  
Cathleen M. Rittereiser, Executive Director, Commonfund Institute

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

12:00 pm  
Q&A Discussion with Vikram Mansharamani & TII Audience

12:15 pm  
A Conversation on Below Investment Grade Credit, Middle Market Lending, High Yield & Distressed Debt  
A Moderator from Barings will interview a few LPs (TBD) on this topic

12:50 pm  
Networking Luncheon

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MONDAY, FEB 24, 2020 (Continued)

1:50 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

2:45 pm
Q&A Discussion with Dan Clifton & TII Audience

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

SPECIAL THANK YOU TO KPMG FOR YOUR CONTRIBUTION TO OUR SNACKS & PM COFFEE 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

5:05 pm
Q&A Discussion with Anthony Atala & TII Audience

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, Chief Executive Officer & Chief Investment Officer, Morgan Creek Capital Management and Managing Partner, Morgan Creek Digital Assets

6:00 pm
Q&A Discussion with Mark Yusko & TII Audience

6:15 pm
End of Sessions Day One

6:30 pm to 9:30 pm   DINNERSPONSORSHIPS STILL AVAILABLE! IF INTERESTED EMAIL ANDREA SZIGETHY
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

8:00 am to 8:30 am
Breakfast Available for All Attendees

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8:30 am
Keynote Address: Climate Change: What Does This Mean For Investors?
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 & 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.

Bob Litterman, Chairman, Risk Committee, Kepos Capital

9:15 am
Q&A Discussion with Bob Litterman & TII Audience

9:30 am
The Opportunities & Challenges of Investing in Asia
Moderator: Andrew C. Burns, Jr., Founder, Conover Investment Advisory, LLC
Panelists: Patricia J. Gerrick, Chief Investment Officer, Progress Investment Management Company
Stephen Johansen, Chief Investment Officer, Waypointe
Raj Venkatesan, Founder & Chief Investment Officer, Trinity Alps Capital Partners
Daniel Ward, Chief Investment Officer, Virginia Tech Foundation

10:15 am
Morning Networking Break

10:30 am
Building & Implementing a Good Governance Structure: Lessons Learned
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? Our panelists will give real examples drawing from their knowledge and experience working with boards, and how their board structure worked for them as well as challenges they may have encountered along the way. This panel will also focus on sharing some “war stories” on how they have worked with their boards and committees and how they have recovered, fixed issues and learned ways to avoid these challenges in the future. Panelists will also discuss what it was like for them when leaving one organization and starting fresh in a brand new institution. What were the benefits of starting over? This discussion will be co-facilitated by two former CIOs who both have decades of experience leading Emory University and Case Western Reserve University. Our panel of experts will come
TUESDAY, FEBRUARY 25, 2020 (Continued)

from different types of organizations bringing an LP, GP and a consultant together to discuss this very important topic facing our industry. This panel hopes to draw out conversations of both the behavioral dynamics and the investment policy that together provide the foundation for achieving investment objectives.

Co-Facilitators:
Mary Cahill, President, Rivington Capital, Inc. & Investment Committee, The Woodruff Arts Center, Community Foundation for Greater Atlanta, Zeist Foundation & Former CIO, Emory Investment Management (Emory University)
Sally Staley, Trustee & Chair of Investment Committee, The College of Wooster & Former CIO, Case Western Reserve University

Panelists:
David Gilmore, Managing Director, The Harry and Jeanette Weinberg Foundation
Beth Johnson, Partner; US Segment Leader for Family Offices & Senior Consultant, Pavilion, a Mercer Practice
David Thomas, Founder & Chief Investment Officer, Atalan Capital Partners

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: Daniel Breslin, Director, Portfolio Manager/Analyst, Lazard Asset Management
Robert Cresci, Senior Fund Manager, J.O. Hambro Capital Management
Matthew Reiner, CFA, Principal, Co-Portfolio Manager, Adirondack Funds
Gregory Roeder, CFA, Principal, Co-Portfolio Manager, Adirondack Funds

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.

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SPONSORING & SUPPORTING ORGANIZATIONS

THE WINTER INVESTMENT INSTITUTE FORUM
FEBRUARY 24-25, 2020
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* 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.

Daniel Breslin, Director, Portfolio Manager/Analyst, Lazard Asset Management
Daniel Breslin is a Portfolio Manager/Analyst on the US Small-Mid Cap Equity team. He is also responsible for research coverage of companies in the financials sector. He began working in the investment field in 1992. Prior to joining Lazard in 2002, Daniel was with Guardian Life and New York Life. He has an MBA from Pace University and a BA from Rutgers University.

*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 other 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 outsource-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., Investment Committee, The Woodruff Arts Center, Community Foundation for Greater Atlanta, Zeist Foundation & 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.
**James J. Challen, Senior Vice President / Principal, LCG Associates**

Mr. Challen joined LCG Associates in 2009 and is a Senior Vice President. His client relationships include corporations, utilities, endowments, and foundations. In addition to lead consultant responsibilities, James conducts capital market and asset class research, investment manager due diligence, and special topical studies. Before joining LCG, James was with Morgan Keegan & Company as First Vice President of the Manager Due Diligence Group. He was responsible for managing a team that made investment recommendations for institutional and private clients. Concurrently, James was a Portfolio Manager for Morgan Keegan & Company’s Private Client Discretionary Program. He previously held several positions with Morgan Keegan & Company including Research Specialist and Research Associate. James began his career as a Financial Analyst at Remtech Services Inc. James is a CFA Charterholder and a member of the CFA Society of Atlanta. He is also a Chartered Alternative Investment Analyst (CAIA) Charterholder. James graduated with a B.S. in Finance from the Leeds School of Business at the University of Colorado.

**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 to 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, Optimony 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 Optimony 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.

**Mike 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.

**Robert Cresci, Senior Fund Manager, J.O. Hambro Capital Management**

Robert Cresci has 28 years industry experience and is currently a senior fund manager at J O Hambro Capital Management. He has been with the firm since 2013 and is responsible for managing their International Small Companies strategy. Prior to this, he worked for Harding Loewe who he joined in 2006. Throughout his career, Robert has been focused on small and mid-cap stock investing using a fundamental investment style. He graduated from Boston College with a degree in Mathematics in 1985 and received his MBA in Finance from Fordham University.

**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 his 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 Ehrenkrantz 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 Ehrenkrantz 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 Booth School of Business. She has a M.S. and B.S. in Engineering from the University of Texas at Austin. Susanne is a board member of Trinity Charter School, a Texas charter school district dedicated to the educational needs of abused children.

*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 member of its Executive Committee and Investment Committee (immediate past Chair), and a Trustee of the Murray 1693 Scholars Foundation.

*Brian Hiestand, Chief Investment Officer, The College of William & Mary Foundation
Brian joined The College of William and Mary Foundation in 2005 to serve as its first Chief Investment Officer overseeing all of the management functions for the endowment including asset allocation and manager selection and review. Chartered in 1693, by King William III and Queen Mary II of England, The College of William and Mary is the second oldest college in America. Prior to joining William and Mary, Brian was the first Director of Alternative Investments for the Indiana University Foundation in Bloomington, Indiana, where he launched their Alternative Investment Program, including allocations to hedge funds, venture capital, private equity, and timberland. Prior to joining the I.U. Foundation, Brian was a Principal and Portfolio Manager at Harris Investment Management in Chicago. In 2011, Brian received the Institutional Investor Small Endowment of the Year Award. Brian received his B.S. and M.B.A. from Bowling Green State University.

*Ray Jacobson, Chief Investment Officer, Davidson College
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.

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.

*Beth Johnson, Partner; US Segment Leader for Family Offices & Senior Investment Consultant, Pavilion, a Mercer Practice
Beth is a Senior Investment Consultant at Pavilion, a Mercer Practice. She currently services 6 endowment, foundation and family office clients with over $9 billion in aggregate assets under advisement. For these clients, Beth focuses on projects relating to asset allocation, investment manager selection, performance evaluation, and fund operations and governance. Beth’s prior professional experience includes work as an Investment Director for Vanderbilt University’s endowment, where she was responsible for investments across traditional equities and bonds, marketable alternatives, oil and gas and private equity. She started her investment career as an Investment Analyst at Duke Management Company, managing investment projects across all asset classes for Duke University’s endowment office. Beth attended the University of North Carolina – Chapel Hill Graduate School where she completed coursework in Economics. She holds a BA in Economics, Mathematics, Computer Science, and German from Transylvania University in Lexington, Kentucky. Beth has also earned the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations. She is a member of the CFA Institute and a past board member of the CFA Society of St. Louis and the Nashville Society of Financial Analysts. Throughout her career, Beth has remained active in her community, sitting on several not-for-profit boards of directors, previously serving as the Investment Committee Chair and then Chair of the Board for the Missouri Foundation for Health, a $1 billion healthcare foundation in St. Louis. In 2008, she received the Foundation and Endowment Money Management’s Non-Profit Consultant of the Year Award.

*Kris Kapoor, Chief Investment Officer, Furman University
Kristopher N. Kapoor, CFA is Chief Investment Officer at Furman University, where he is responsible for the investment oversight of the university’s endowment and debt program. Prior to joining Furman, Kris was a portfolio manager with BB&T Asset Management and pension investment manager with Michelin North America, Inc. Kris holds the Chartered Financial Analyst designation and is currently a member of the CFA Society of South Carolina. Kris earned a Bachelor of Arts degree in Business Administration from Furman University and a Master of Business Administration in International Management from the Thunderbird School of Global Management, which he earned with distinction.
*Christine Kelleher, Chief of Investments, National Gallery of Art*
Christine Zapotoczky Kelleher is chief of investments at the National Gallery of Art. Previously, Christine served as senior investment officer for Georgetown University. She assisted with the founding of Georgetown’s Investment Office in 2004 and served as acting chief investment officer in 2011. After Georgetown, Christine led investment strategy, sourcing, and evaluation for AveCap. Earlier in her career, she served on the executive team of the Central European University, founded by George Soros, in Budapest, Hungary. She received a BA in Russian and international relations from Bucknell University and holds MA’s in Russian and East European studies and in Central European history from Georgetown University. Christine is a member of the finance committee of the YWCA National Capital Area, an executive officer for the Bucknell University Alumni Association Board of Directors, and an advisor to the Kayo Conference Series. She lives in Washington, DC with her husband and son.

*Jonathon King, President & CEO, UNC Management Company*
Jonathon King, President & CEO of UNC Management Company, joined the Company in January 2005. In this role Mr. King is also the Chief Investment Officer of the UNC Investment Fund. Prior to joining UNC Management Co., Mr. King was the Associate Vice President and Director of Investments for Dartmouth College where he worked for sixteen years. Previously, Mr. King was an Investment Officer at New England Mutual Life Insurance Company in Boston, MA and a Senior Accountant at Price Waterhouse & Co. in Hartford, CT. Mr. King graduated cum laude from Middlebury College with a Bachelor of Arts degree in Environmental Studies. Mr. King also graduated with an MBA degree from the Amos Tuck School at Dartmouth College and is a Chartered Financial Analyst.

*Don Lindsey, Chief Investment Officer, American Institutes for Research*
Don joined the American Institutes for Research in November 2014 in the role of chief investment officer. Prior to joining AIR, he was the chief investment officer for The George Washington University where he was responsible for management of the university’s $1.5 billion endowment for eleven and a half years. In 2000, Don formed the University of Toronto Asset Management Corporation which managed the university’s endowment, defined benefit plan and operating funds. He began his investment career with the University of Virginia where he served as investment analyst, senior investment officer, assistant director of investments and director. Don earned a Bachelor of Arts in Political Science from Virginia Tech, a Master of Business Administration from James Madison University and a Master of International Policy and Practice from The George Washington University. He is a CFA charter holder and a member of the Washington CFA Society. Don is a member of the investment advisory committee of the Virginia Retirement System.

**Bob Litterman, Chairman, Risk Committee, Kepos Capital**
Robert 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**
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 for the PBS Newshour and a regular contributor to Worth Magazine. His ideas and writings have also appeared in Fortune, Forbes, The New York Times and a long list of other publications. 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. Millions of readers have enjoyed his unique multi-lens approach to connecting seemingly irrelevant dots. Dr. Mansharamani also regularly advises sovereign wealth funds, endowments, foundations, and family offices on how to manage their allocations in the face of overwhelming uncertainty. Several of these advisory clients encouraged him to launch Kelan Capital and were the initial investors in an investment partnership organized around his global themes. Dr. Mansharamani is currently a lecturer at Harvard University, where he teaches students to use multiple perspectives in making tough decisions. He has also taught classes at Yale University on business ethics and governance, financial bubbles, and economic inequality. In addition to teaching, he also advises several Fortune 500 CEOs to help them navigate the radical uncertainty in today’s global business and regulatory environment. He has a PhD and two Masters degrees from MIT and a Bachelors degree from Yale University, where he was elected to Phi Beta Kappa.
*Mark E. Roberts, 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 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

**Muthu Muthiah, Chief Investment Officer, Group Health Foundation**

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.

**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.”

**Matthew Reiner, CFA, Principal, Co-Portfolio Manager, Adirondack Funds**

Matt joined Adirondack Research & Management Inc. in February 2005 as principal, and co-portfolio manager of the Adirondack Small Cap Fund. Previously, he was an institutional portfolio manager and vice president of research at Paradigm Capital Management. Matt began his investment career with CL King & Associates as a sell-side research associate and later as an equity analyst. He earned his MBA from the University at Albany and his undergraduate degree from the State University of New York at Plattsburgh. Matt has been a holder of the Chartered Financial Analyst designation since 1999. As co-portfolio manager of the Adirondack Small Cap Mutual Fund, Matt was recognized in 2011, 2013 and 2018 by Lipper Inc. for managing the best small cap value fund based on consistently strong risk-adjusted performance, relative to peers, in the U.S. for the three-year period from 2008 to 2010, for the five-year period from 2008 to 2012, and for the ten-year period from 2008 to 2017, respectively.

**Cathleen M. Rittereiser, Executive Director, Commonfund Institute**

Cathleen M. Rittereiser leads Commonfund’s educational, market research and professional development activities as Executive Director of Commonfund Institute. She is the co-author of the books *Foundation and Endowment Investing and Top Hedge Fund Investors: Stories, Strategies, and Advice.* Prior to joining Commonfund, Cathleen was the Founder and Chief Executive Officer of Uncorrelated, LLC, a conference and thought leadership publishing platform for endowment, foundation, pension and insurance, and a frequent speaker and writer on the endowment model and Outsourced CIO (OCIO). Prior to Uncorrelated, she held investor relations and marketing roles with leading financial services firms and hedge funds. She received an A.B. from Franklin & Marshall College, where she served on the investment committee, and an M.B.A. from NYU Stern School of Business.

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member of the North Carolina Society of Financial Analysts and the American Finance Association. Mr. Roberts has served on multiple non-profit boards.

Gregory Roeder, CFA, Principal, Co-Portfolio Manager, Adirondack Funds
Greg founded Adirondack Research & Management Inc. in 2004 and currently serves as co-portfolio manager of the Adirondack Small Cap Fund. Prior to founding ARM, Greg served 18 years in various capacities within the financial services industry, including analyst/portfolio manager for Eddy & Wakefield, equity research analyst for CL King and Associates and assorted roles within KeyCorp’s credit/risk management groups. Greg graduated from the State University of New York at Plattsburgh with a bachelor’s degree in economics and Hofstra University with a master’s degree in finance. He has been a holder of the Chartered Financial Analyst designation since 2002. As co-portfolio manager of the Adirondack Small Cap Mutual Fund, Greg was recognized in 2011, 2013 and 2018 by Lipper Inc. for managing the best small cap value fund based on consistently strong risk-adjusted performance, relative to peers, in the U.S. for the three-year period from 2008 to 2010, for the five-year period from 2008 to 2012, and for the ten-year period from 2008 to 2017, respectively.

*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. Ms. Sill 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 Foundation and heads the investment committee for First Foundation. She also currently serves on several advisory committees for various private partnerships. Donna earned her MBA with concentrations in accounting and analytical finance from the University of Chicago Booth School of Business; she holds a Bachelors of Science in Mathematics from the University of Notre Dame, Magna Cum Laude, Phi Beta Kappa; professional designations include CFA charter holder and an Associate of the Society of Actuaries.

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 retired 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.

**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, Bradsdeals.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 and Managing Partner, Morgan Creek Digital Assets*

Mark Yusko is the Founder, CEO and Chief Investment Officer of Morgan Creek Capital Management. He is also the Managing Partner of Morgan Creek Digital Assets. Morgan Creek Capital Management was founded in 2004 and currently manages close to $2 billion in discretionary and non-discretionary assets. Prior to founding Morgan Creek, Mr. Yusko was CIO and Founder of UNC Management Company (UNCMC), the Endowment investment office for the University of North Carolina at Chapel Hill. Before that, he was Senior Investment Director for the University of Notre Dame Investment Office. Mr. Yusko has been at the forefront of institutional investing throughout his career. An early investor in alternative asset classes at Notre Dame, he brought the Endowment Model of investing to UNC, which contributed to significant performance gains for the Endowment. The Endowment Model is the cornerstone philosophy of Morgan Creek, as is the mandate to Invest in Innovation. Mr. Yusko is again at the forefront of investing through Morgan Creek Digital Assets, which was formed in 2018. Morgan Creek Digital is an early stage investor in blockchain technology, digital currency and digital assets through the firm’s Venture Capital and Digital Asset Index Fund. Mr. Yusko received a BA with Honors from the University of Notre Dame and an MBA in Accounting and Finance from the University of Chicago.
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