



Seventh Annual Endowment, Foundation and Philanthropy Conference

Thursday June 2, 2016
Hub Cira Center
2929 Arch Street, Philadelphia, PA

Agenda

- 7:30 AM - 8:20 AM** **Registration and Breakfast**
- 8:20 AM - 8:30 AM** **Welcome and Introductions**
- Jeremy Bach, CFA, Bach Capital Advisors, LLC
Jeremy Tennenbaum, CFA, The Altman Foundation
- 8:30 AM - 9:20 AM** **Panel A: Why Not Engage an Outsourced CIO?**
Moderator: Robby Boyd, CFA, CapitalShip, LLC
- Dick Flannery, TIFF
Geraldine Watson, Rockefeller Brothers Fund
Peter Havens, Baldwin Investment Management
Jeannine Caruso, New Providence Asset Management
- Panel B: THE NO SPIN ZONE : What Nonprofit Leaders Do Not What to Hear From Their Financial Advisers**
Moderator: Michael Cosack
- David Griffith, Episcopal Community Services
Toni Pergolin, Bancroft
Joe Trainor, Wistar Institute
Tom Tritton, Chemical Heritage Foundation
- 9:30AM - 10:20 AM** **Panel A: Impact Investing: Why? How? Who?**
Moderator: Mark Schlegel, CFA, TFS Capital
- Ron Albahary, CFA, Threshold Group
Jess Gaspar, Commonfund
Laura Kind McKenna, Patricia Kind Foundation
Lenora Suki, CFA, CAIA, Bloomberg; Jesse Smith Noyes Foundation
- Panel B: Findings from Behavioral Finance: Implications for Non-Profit Boards**
Moderator: Jeremy Tennenbaum, CFA, The Altman Foundation
- Michael Liersch, Merrill Lynch
- 10:20 AM - 10:40 AM** **Networking Break**

10:40 AM - 11:30 AM

Morning Keynote: Thoughts on Investing Today

Presenter: Jeremy Bach, CFA, Bach Capital Advisors, LLC

Speaker: Jim Paulsen, Wells Fargo

11:40 AM - 12:30 PM

Panel A: CIO Panel: Current Portfolio Management Opportunities and Challenges

Moderator: Tom Chapin, CFA, Mill Creek

Jim McCabe, Drexel Morgan
Chris Piros, CFA, PNC
Cathy Ulozas, Drexel University
Scott Gates, Friess Associates

Panel B: Innovations in Philanthropy

Moderator: Jeffrey Lauterbach, Lauterbach & Co.

Katherina Rosqueta, Center for High Impact Philanthropy
Clay Hamlin, Hamlin Family Foundation
Dr. Keith Leaphart, Lenfest Foundation

12:30 PM - 2:00 PM

Luncheon and Networking

Luncheon Keynote: Thoughts on Geographic and Other Forms of Risk

Presenter: Peter Maher, CFA, The Board of Pensions PC (U.S.A.)

Speaker: Jesper Koll, WisdomTree

2:10 PM – 3:00 PM

Panel A: Investing in Privates: Do the Returns Outweigh the Risks?

Moderator: Mark Hoffman, CFA, PNC Asset Management

Mike Koenig, Hamilton Lane
Sonali Dalal, CFA, Penn State
Bob Long, Star Mountain Capital
Jennifer Sassani, Lehigh University

Panel B: Spending Policy in a World with Returns Under 5%

Moderator: Edward P. Hickey, CFA, PNC Institutional Asset Management

Daniel Wallick, Vanguard
Donald Friel, Holy Redeemer Health System
John Keshner, Northern Trust
Kari Fazio, Bryn Mawr College

3:10 PM - 4:00 PM

Panel A: Smart Beta for Institutional Investors: Pros and Cons

Moderator: Jeremy Bach, CFA, Bach Capital Advisors, LLC

Wesley Gray, Alpha Architect
Joel Dickson, Vanguard
Stephen Kwa, Schroders

Panel B: Strategies to Strengthen High Performance in the Nonprofit Sector

Moderator: Laura Solomon Esq., Laura Solomon & Associates

Jeffrey Haskell, Foundation Source
Nadya Shmavonian, The Repositioning Fund
George Morris, Oliver Wyman

4:00 PM – 5:00 PM

Networking Reception

Registration Fee:

CFA Society Members (all Societies): \$110.00

Non-Members: \$195.00

Non-Profits: \$110.00

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CFAP Mission:

To lead a preeminent community of investment and finance professionals who promote the highest standards of ethics, education and professional excellence.

Our Vision:

We aspire to a Society that:

- Serves our members and other financial professionals who seek education, knowledge, professional development, connection and inspiration;

- Sets the standard among Philadelphia-area investment and financial professionals on the topics of ethics and excellence of practice.