

Tuesday, June 13

Pre-Event Dinner (By Invitation Only)

7:00
P.M.

A longtime investment research executive on Wall Street, Andrew Eberhart has worked for Citi Private Bank, Lazard and the private client group of U.S. Trust. As chief investment officer of a prominent single-family office, he will discuss frontier investing for our invitation-only Pre-event Dinner.

Speaker:

Andrew Eberhart, Chief Investment Officer, A Prominent Single-Family Office

MAIN CONFERENCE

Wednesday, June 14

Breakfast Workshop: Asset Allocation (By Invitation Only) Gateway Room

8:00
A.M.

As a value-added service for our LP audience, our private breakfast workshop will serve as a private venue for off-record discussion about the challenges of running a successful investment office, including managing investor expectations, incorporating fintech, alignment of interests, client services, outsourcing, fee and performance reporting, and more.

Welcome Address

Banking Hall

9:00
A.M.

Co-chair:

Alex Bangash, Chief Executive Officer, Trusted Insight

Session I: The Changing Institutional Investment Landscape

Banking Hall

Sustainable Strategy In A Low-Yield Environment

9:05
A.M.

Speaker:

Stuart Mason, Chief Investment Officer, University of Minnesota

Leaving A Legacy: Investing For Change

9:25
A.M.

Speaker:

Joel Wittenberg, Chief Investment Officer, W.K. Kellogg Foundation

Balancing Risk With Alpha Return

9:45
A.M.

Speaker:

David Holmgren, Chief Investment Officer, Hartford HealthCare

The CIO Leadership Roundtable: Trumponomics 101

He scored a historic upset in the U.S. Presidential election, but can Donald Trump make the market great again? The brash, publicity-seeking real estate mogul is implementing his fiscal vision from the Oval Office, clamoring for change to both monetary policy and industry regulation as well as a hawkish stance on international trade. But is "Trumponomics" viable? Our CIO leadership roundtable will discuss asset allocation and portfolio positioning under the Trump administration.

10:05
A.M.

Moderator:

Ari Levy, Senior Technology Reporter, CNBC

Featuring:

Chris Li, Chief Investment Officer, Lockheed Martin Investment Management Company

Stuart Mason, Chief Investment Officer, University of Minnesota

David Holmgren, Chief Investment Officer, Hartford HealthCare

Sam Gallo, Chief Investment Officer, University System of Maryland Foundation

10:45
A.M.

Morning Networking Break

Session II: Driving Alpha Return

Breakout Stream A Banking Hall

11:00
A.M.

Introduction

Speaker:

Alex Bangash, Chief Executive Officer,
Trusted Insight

11:05
A.M.

True Early-Stage Venture: The Secrets To Building A Unicorn

We will talk with entrepreneurs turned VCs responsible for investing early in: Airbnb, Stripe, Dollar Shave Club, DogVacay, Hyperloop One, and Reddit about the past, present, and future landscape of Silicon Valley venture capital.

Moderator:

Alex Bangash, Chief Executive Officer,
Trusted Insight

Breakout Stream B Adriatic Room

11:00
A.M.

Introduction

Speaker:

Trang Nguyen, Portfolio Manager,
Trusted Insight

11:05
A.M.

Structuring A Diversified Real Assets Portfolio

Despite resistance to private investment in public infrastructure in America, LP appetite for real assets is growing. Mark Canavan of New Mexico Education Retirement Board will detail the value of real assets portfolio diversification as well as break down the risk and reward profile for energy, mining, timber and water and wastewater.

Featuring:

Michael Jones, Chief Executive Officer, Science Inc.

Shervin Pishevar, Co-founder/Managing Director, Sherpa Capital, Co-founder, Hyperloop One

Alexis Ohanian, Co-founder, Reddit, Co-founder/Managing Director, Initialized Capital

Aaref Hilaly, Partner, Sequoia Capital

Reassessing The Golden Age Of Private Equity

Faced with outsized market demand and heightening LP pressure for transparent performance and fee reporting, the formerly white shoe asset class known as private equity is having another – very public – boom time. But with over \$800 billion in dry powder, has private equity peaked? Our Private Equity Panel Discussion will revisit the strategic role of the asset class in a portfolio.

Moderator:

Ian Floyd, Editor, Trusted Insight

Featuring:

Dale Hunt, Managing Director, Private Equity, Ascension Investment Management

Josh Stern, Director, Private Markets, Robert Wood Johnson Foundation

John Heneghan, Investment Team, Equity Group Investments

Tristram Perkins, Managing Director, Neuberger Berman

11:45
A.M.

Speaker:

Mark Canavan, Senior Portfolio Manager, New Mexico Educational Retirement Board

The Drill-Down On U.S. Oil And Gas

The oil and gas industry is showing its first signs of life after over two years of turmoil; however, the industry remains one of the largest and most vital to the global economy. The energy industry in the United States is leading the world in production growth due to innovation and technological advances, but remains highly fragmented. Edward Geiser of Juniper Capital will discuss key trends in oil and gas private equity investing and why he feels the middle-market is the best way to capitalize on the current opportunity.

Speaker:

Edward Geiser, Chief Executive Officer, Juniper Capital Advisors

11:25
A.M.

Is Private Credit Living On Borrowed Time?

Private credit, or private debt, has evolved from the “shadow banking” system born from Wall Street reform to a full-on asset class. Though free of its post-crisis stigma, private credit is nonetheless hard to bucket. Our Private Credit session will offer insights on key innovations and emerging trends that will transform the trajectory of this asset class.

Moderator:

Neal Graziano, Director Of Investments, W.K. Kellogg Foundation

Featuring:

Eric Kirsch, Global Chief Investment Officer, Aflac

Rodney Overcash, Director, Credit Strategy, Margaret A. Cargill Philanthropies

David Barcus, Investment Manager, Denison University

11:45
A.M.

12:25
P.M.

Lunch
Banking Hall

Session III: Rethinking Alternative Investing

Banking Hall

Fireside Chat: Leading The Fintech Disruption

1:30
P.M.

Though Wall Street will retain its status as the global capital for investment banking, the West Coast is poised to emerge as the new hub of the financial services industry. Fintech, short for financial technology and originating from Silicon Valley, is automating and streamlining administration, corporate finance and even investment management. Mike Cagney, former Wells Fargo executive and co-founder of online lender SoFi, will offer his ground-floor perspective on the inevitable blurring of financial services and technology.

Interviewers:

Alex Bangash and Trang Nguyen

Speaker:

Mike Cagney, Chief Executive Officer, SoFi

Panel Discussion: Redefining Hedge Fund Alpha, Refilling The Alternative Bucket

1:50
P.M.

Maligned with high cost and lackluster performance, hedge fund alpha is being diminished. Meanwhile, LP co-investment, as opposed to allocating to a fund manager, is gaining credence as a superior avenue for accessing lucrative private equity revenue. In "Redefining Alternative, Refilling the Bucket," we examine market disruption in alternative investing.

Moderator:

Elaine Orr, Director of Investments, Silicon Valley Community Foundation

Featuring:

Dan Parker, Deputy Chief Investment Officer, Texas Tech University

Pamela Campbell, Managing Director, Washington University Investment Management Company

Jonathan Hook, Chief Investment Officer, The Harry and Jeanette Weinberg Foundation

U.S. Real Estate: Analysis And Outlook

2:30
P.M.

From outlier to alternative investment to "fourth asset class," real estate today is a requisite 10 percent allocation. Yet, less than a decade removed from the collapse of the housing market, the Federal Reserve is zeroing in on a possible asset-price bubble in commercial real estate. Tom Masthay of Texas Municipal Retirement System will address the imbalance in market demand as well as how demographic change is impacting real estate.

Speaker:

Tom Masthay, Director of Real Assets, Texas Municipal Retirement System

Roundtable Discussions

Roundtable #1 – Replacing Hedge Funds With Cash-Secured Put Writing

Doug Kramer, Managing Director, **Neuberger Berman**

Roundtable #2 – The Competitive Landscape For Middle-Market Oil & Gas

Edward Geiser, Chief Executive Officer, **Juniper Capital Advisors**

Roundtable #3 – The Next Wave of Intelligence, Machine Learning

Jake Klamka, Founder, **Insight Data Science**

Bradford Cross, Chief Executive Officer, **Merlon Intelligence**

2:50
P.M.

Session IV: The Global Marketplace

Banking Hall

Decoding Emerging Markets' Alpha, Unlocking Global Growth

As assets mature and prices inflate in the developed world, investors increasingly look to emerging markets to generate attractive returns. Our Emerging Markets Alpha session will examine how demographic, socioeconomic and regulatory changes have unlocked this thriving market opportunity.

Moderator:

Trang Nguyen, Portfolio Manager, **Trusted Insight**

Featuring:

Ahmad Saad, Head of Fixed Income and Private Equity, **A Prominent Single-Family Office**

Karthik Reddy, Managing Partner, **Blume Venture Advisors**

Sandesh Patnam, Partner and Portfolio Manager, **Premji Invest**

Eric Acher, Founder and Managing Partner, **Monashees**

3:20
P.M.

4:00
P.M.

Afternoon Networking Break

Creating A Global Private Equity Strategy For A Multi-Trillion Dollar Company (Give Or Take A Trillion)

Jon Nieman, co-founder of five-year-old Saudi Aramco Energy Ventures, will offer a how-to on constructing a global portfolio strategy encompassing both private equity and venture capital, as well as discuss the unique nature of investing for a state fund.

Speaker:

Jon Nieman, Head of Private Equity, **Saudi Aramco Energy Ventures**

4:20
P.M.

Putting China In Perspective

The unexpected second-quarter tidal wave of investor capital from the mainland is the latest upshot of market reform in China. With the fast rise of China as a global economic superpower wroughting seismic pricing disruption – from real estate in New York to copper in London – not to mention criticism on international trade, our expert panel will assess its more liberated but still immature capital market.

4:40
P.M.

Moderator:

Melissa Guzy, Managing Partner, **Arbor Ventures**

Featuring:

Alan Chang, Partner and Managing Director, **Capricorn Investment Partners**

Chris Li, Chief Investment Officer, **Lockheed Martin Investment Management Company**

Jon Nieman, Head of Private Equity, **Saudi Aramco**

Seungha Ku, Head of Offshore Private Equity, **CreditEase**

5:20
P.M.

Closing

Speaker:

Alex Bangash, Chief Executive Officer, **Trusted Insight**

5:25
P.M.

Reception

8:00
P.M.

Event Close