



Wednesday, October 19, 2016

The Palace

333 Davidson Avenue

Somerset, New Jersey

8:00 a.m. – 5:00 p.m.

### Program Agenda

**8:00 a.m. – 5:00 p.m.**

**SPONSOR MARKETPLACE – *East Foyer and Library***

*Visit with experts throughout the day for conversation and complimentary materials*

**8:00 a.m. - 9:00 a.m.**

**NETWORKING BREAKFAST & REGISTRATION – *East Foyer and Library***

**9:00 a.m. - 10:00 a.m.**

**OPENING PLENARY – *East Ballroom***

A Common Sense Risk Framework in Uncertain Times

*Keynote Speaker:*

Joshua Fenton, Director of Investments

The Leona M. and Harry B. Helmsley Charitable Trust

**10:15 a.m. – 12:05 p.m.**

**CONCURRENT MORNING SESSIONS – *2<sup>nd</sup> Floor Salons***

**10:15 a.m. – 11:05 a.m.**

- **The Ins and Outs of Changing Your Investment Provider – *Salon 1***

*The nuts and bolts of making the switch*

- **Asset Allocation Strategy – *Salon 2***

*Best practices that ensure you achieve your objective including asset allocation, discipline, managing risk and more*

- **New Approaches to Portfolio Construction – *Salon 4***

*A look at current trends including factor-based and time-span portfolios*

**11:15 a.m. – 12:05 p.m.**

- **Evaluating Investment Managers: People, Process and Philosophy – *Salon 1***

*What you need to know to derive the results you want and how to evaluate along the way*

- **Investing a Small Endowment Portfolio – *Salon 4***

*Choices, options and fiduciary responsibilities*

- **Active vs. Passive Investing – Salon 2**  
*Which approach should you use and when?*

**12:15 p.m. -2:00 p.m.**

**LUNCHEON PLENARY – East Ballroom**

*Market Outlook: Managing Your Portfolio Today for the Long-Term*

Moderated by Alma DeMetropolis, President, J.P. Morgan New Jersey

Panelists:

- John Church, Glenmede
- Ted Leh, Goldman Sachs
- Michael Vaknin, J.P. Morgan

**2:15 p.m. – 3:05 p.m.**

**CONCURRENT AFTERNOON SESSIONS – 2<sup>nd</sup> Floor Salons**

- **What to Invest in When Nothing Looks Good – Salon 2**  
*Navigating the challenges of a low-interest rate environment*
- **Alternative Investments – Salon 1**  
*What to consider whether you're adding to your portfolio or want to maximize what you already have*
- **Good Governance: From Policies to Practice – Salon 4**  
*A range of topics for board and staff including key fiduciary responsibilities, the Prudent Investor Act, recruiting a board that works, detecting fraud, and more*
- **Different Approaches to Managing the Investment Process – Salon 3**  
*CIO, consultant, or committee run – how do you determine what's best for your organization?*

**3:15 p.m. - 4:30 p.m.**

**CLOSING PLENARY – East Ballroom**

*Investment Fraud and How to Prevent It Happening to You*

Moderated by Laura Posner, Bureau Chief, New Jersey Bureau of Securities

Panelists:

- Dan Alonso, Exiger
- Rick Barry, Rick Barry Consulting
- Aaron Beam, Beam Speaks
- Brian Cosgriff, FBI
- Paul Roberts, FBI

**4:30 p.m.**

**COCKTAIL RECEPTION – Library**