

REGISTER TODAY FOR
EARLY-BIRD DISCOUNT



Council of New Jersey Grantmakers
**Investment Forum
for Foundations
and Endowments**

*A conference for CEOs, executive directors, CFOs, trustees,
and finance and investment committee members*



Wednesday, November 7, 2018

**The Palace at Somerset Park
333 Davidson Avenue
Somerset, New Jersey**

8:30 a.m. to 4:30 p.m.

Register online at www.cnjg.org



8:30 to 9:15 a.m.

REGISTRATION, CONTINENTAL BREAKFAST, NETWORKING, & SPONSOR MARKETPLACE

9:15 to 10:15 a.m.

OPENING PLENARY

Keynote Speaker:

Kim Y. Lew

Vice President and Chief Investment Officer,
Carnegie Corporation of New York



10:30 to 11:20 a.m.

CONCURRENT MORNING SESSIONS I

11:30 a.m. to 12:20 p.m.

CONCURRENT MORNING SESSIONS II

12:30 to 2:15 p.m.

LUNCHEON PLENARY

Market Outlook:

Managing Your Portfolio Today for the Long-Term

Signature Investor Sponsor: JPMorgan Chase & Co.

Moderator:

Michael Griffin

Managing Director and Senior Investment Specialist,
J.P. Morgan



2:30 to 3:20 p.m.

CONCURRENT AFTERNOON SESSIONS

3:30 to 4:30 p.m.

CLOSING RECEPTION

Register online at www.cnjg.org

CONCURRENT MORNING SESSIONS I (Select One)

10:30 to 11:20 a.m.

- **The Basics of Endowment Investing and Portfolio Construction**

Know the choices you face and how to get help

- **Choosing the Right Approach for Managing the Corpus**

CIO, portfolio manager, consultant, or committee – what model is best for your organization?

- **Alternative Investments: Are They Right for Your Organization's Portfolio?**

Keep up to date on the pros and cons of ever-changing options

- **From Passive to Active Investing: The Evolution of ETFs**

The more you know, the better the results

CONCURRENT MORNING SESSIONS II (Select One)

11:30 a.m. to 12:20 p.m.

- **Best Practices for Rebalancing Portfolio Asset Allocations**

What was right yesterday might be wrong tomorrow – the importance of reviewing strategy to align with organizational objectives

- **Setting a Spending Policy to Meet Your Organization's Objectives**

Where mission meets money – the delicate art of balancing immediate spending needs and long-term endowment sustainability...and the law that governs these choices

- **Socially Responsible Investments & Impact Investing**

Strategies that directly deliver against mission

- **A Framework for Evaluating Your Endowment's Investment Risk**

How to assess your portfolio's risk and avoid a dangerous guessing game

CONCURRENT AFTERNOON SESSIONS (Select One)

2:30 to 3:20 p.m.

- **Governing Your Corpus: From Policies to Practices**

Fiduciary responsibilities, detecting fraud, and other duties need not be intimidating

- **Understanding the Cost of Investments: Negotiating and Tracking Management Fees**

Make sure you're getting a deal as good as it looks

- **Effective Approaches to Small Endowment Stewardship**

Size doesn't matter when it comes to best practices

- **A Primer on Cryptocurrency**

Learn about the disruptive potential of blockchain technology

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REGISTRATION FEES

Early-Bird Rate (Ends October 12) / Standard Pricing

First Regional Association Member (including CNJG)
\$195 / \$225

Additional Regional Association Members
\$165 / \$195

Non-Regional Association Member Foundation*
\$350 / \$450

Endowed Charity
\$165 / \$195

*\$150 of the Non-Regional Association Member Foundation fee can be applied to CNJG membership.

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About the Council of New Jersey Grantmakers

The Council of New Jersey Grantmakers is the center for philanthropy in New Jersey, serving the leading independent, corporate, family, and community foundations of our state. We support our 125+ members by strengthening their capacity to address New Jersey's and society's most difficult problems. We also access the resources of the philanthropic community – funding, expertise, leverage – to provide leadership on statewide issues. Past leadership efforts include a study of healthcare conversions and their philanthropic legacies, creating access to philanthropic dollars in underserved communities, and partnering with the state to pilot a highly regarded national model that addresses crime prevention through youth development. In addition, the Council facilitated the landmark study, *Facing Our Future*, which outlined the fiscal crisis facing all levels of New Jersey government.

Council of New Jersey Grantmakers

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