

CNJG INVESTMENT FORUM AGENDA
November 5, 2014 at The Palace, Somerset, NJ

7:30 a.m. – 6:00 p.m.

SPONSOR MARKETPLACE *East Foyer and Library*

Visit with our experts throughout the day for conversation and complimentary materials.

7:30 a.m. – 8:30 a.m.

NETWORKING BREAKFAST & REGISTRATION *East Foyer*

Host Sponsor: Glenmede

8:30 a.m. – 9:30 a.m.

OPENING PLENARY *East Ballroom*

Partner Sponsor: J.P. Morgan

Oversight of Your Investment Portfolio: What You Have to Get Right

Featuring:

Brian O’Neil, Robert Wood Johnson Foundation

10:00 a.m. – 12:30 p.m.

CONCURRENT SESSIONS I *2nd Floor Salons*

Choose A or ONE EACH from B & C

A. 10:00 a.m. – 12:30 p.m. - SUPER SESSION

Strategist Sponsor: TD Bank

ALTERNATIVE INVESTMENTS: A DEEPER DIVE

The latest on hot topics and due diligence matters you can’t afford to miss

Part 1: Hot Topics

- Hedge Funds – Rick Nardis, UBS
- Private Equity – Jodi Hochberger, Goldman Sachs
- Real Estate – Brooks Blake, Verdis Investment Management
- Liquid Alternatives – Jeffrey Majit, Neuberger Berman
- Facilitator: Paige Carlson-Heim, TD Bank

Part 2: Due Diligence

- Chris Petermann, O’Connor Davies
- Jennifer Wildeman, PNC
- Facilitator: Paige Carlson-Heim, TD Bank

OR

B. 10:00 a.m. – 11:30 a.m.

Choose ONE Session

PRIMER ON PORTFOLIO CONSTRUCTION

Best practices that ensure you achieve your objectives

- Tony Werley, J.P.Morgan
- Christopher Blume, Goldman Sachs
- Patrick Nolan, BlackRock
- Facilitator: Maria Tanzola, UBS

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MISSION-RELATED INVESTING

Maximizing returns on socially beneficial investment opportunities

- Mamundi Subhas , Neuberger Berman
- Antony Bugg Levine, Non-Profit Finance Fund
- Mathew Kraut, Hawthorn, PNC
- Facilitator: Hans Dekker, Community Foundation of New Jersey

MANAGING YOUR MANAGERS

What you need to know to be effective

- S. Alan McKnight, SunTrust
- Mark Caplinger, Mariner Wealth Advisors, an affiliate of Brinton Eaton
- Roger Pratt, The Schumann Fund for New Jersey
- Facilitator: Erika McDaniel, Glenmede

DETERMINING YOUR NON-PROFIT SPENDING POLICY

Key factors you should consider to maintain the longevity of your corpus

- Mary Jane Bobyock, SEI
- Carolyn Ainslie, Princeton University
- Laura Solomon, Laura Solomon, Esq. & Assocs.
- William V. Engel, Engel & Devlin, P.C.
- Facilitator: Warren Tranquada, NJPAC

AND

C. 11:45 a.m. – 12:30 p.m.

Choose ONE Mini-Session

OPPORTUNITIES IN FIXED INCOME

Navigating the challenges of a low-interest rate environment

- Fred Walls, SunTrust
- Kristina Hooper, Allianz
- Facilitator: Bill Gibson, The Leavens Foundation, Inc.

ACTIVE VS. PASSIVE INVESTING

Which approach should you use and when?

- Susan McDermott, Pavilion Advisory Group
- Edward Zinbarg, New Jersey Symphony Orchestra
- Facilitator: Rich Rosen, TD Bank

12:45 p.m. – 2:00 p.m.

LUNCHEON PLENARY *East Ballroom*

Market Outlook: Managing Your Portfolio Today

Featuring:

- Tony Werley, J.P.Morgan
- Ted Leh, Goldman Sachs
- John Church, Glenmede
- Moderator: Linda Bowden, PNC

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2:15 p.m. – 3:30 p.m.

CONCURRENT SESSIONS II *2nd Floor Salons*

Choose ONE Session

CONSTRUCTING AN ALTERNATIVE INVESTMENT PORTFOLIO

How to build an AI portfolio that does what it should: diversify and manage your overall investment risk

- John Church, Glenmede
- Darren Spencer, Russell Investments
- Cynthia Evans, Geraldine R. Dodge Foundation
- Facilitator: Bill Gibson, The Leavens Foundation, Inc.

CAPITALIZING ON GLOBAL OPPORTUNITIES

Where should you be looking to take your portfolio internationally?

- Maria Ramirez, Maria Fiorini Ramirez
- Martin Schulz, PNC
- Facilitator: Maria Tanzola, UBS

THE OUTSOURCED CIO

The do's and don'ts of implementing an investment management model

- S. Alan McKnight, SunTrust
- Antonio DiCasolo, Pavilion Advisory Group
- Sonya Woloshyn, Turrell Fund
- Facilitator: Joseph Clark, Goldman Sachs

GOOD GOVERNANCE: FROM POLICIES TO PRACTICE

A range of topics for board and staff including key fiduciary responsibilities, the Prudent Investor Act, recruiting a board that works, and more

- William Jarvis, Commonfund Institute
- Melanie Quackenbush, Glenmede
- Laura Solomon, Laura Solomon, Esq. & Assocs.
- Facilitator: Don Rosenthal, Healthcare Foundation of New Jersey

3:45 p.m. - 4:45 p.m.

CLOSING PLENARY *East Ballroom*

Managing the Corpus: A Conversation with Renowned Philanthropists/Money Managers

Featuring:

- J. Peter Simon, William E. Simon & Sons LLC
- Leslie C. Quick III, Massey Quick
- Moderator: Feather Houstoun, Wyncote Foundation

5:00 p.m. – 6:00 p.m.

COCKTAIL RECEPTION *Library*

Host Sponsor: PNC