# 28TH INVESTMENT CONFERENCE

## AGENDA

Monday, September 9 –
Tuesday, September 10, 2024

*Please note - agenda is subject to change.*

# MONDAY, SEPTEMBER 9

**8:30 AM – 9:00 AM** **BREAKFAST**

**9:00 AM – 10:00 AM** **Pre-Conference Session A — Can't Get No Satisfaction**

*Share your wishlist, as a plan sponsor, on what you'd like to see more of from your plan participants*

Tom Cook – Principal, Senior Consultant, NEPC

Dan Beaton – Senior Consultant, NEPC

**Pre-Conference Session B — Mitigate Risks and Maximize Returns: Fund Commitments, Co-Investments and Direct Sourcing**

*A look at the opportunities, risks and nuances of direct sourcing and co-investing*

Dan Gimbel, CIMA® – Principal, Senior Consultant, NEPC

Michael Painter – Managing Partner, Plexus Capital

Sigurd Strack – Chief Investment Officer of Private Investments, Trinity Alps Capital

**9:00 AM – 10:30 AM** **REGISTRATION**

**10:30 AM – 11:00 AM** **Welcome & State of the Firm**

Mike Manning, CFA, CAIA – Managing Partner, NEPC

**11:00 AM – 11:30 AM** **NEPC Research: Delivering Results for our Clients**

*Get the inside scoop on our 70-person strong Research team and discover what sets us apart from our peers.*

Tim McCusker, FSA, CFA, CAIA – Partner, Chief Investment Officer, NEPC

**11:30 PM – 12:30 PM** **LUNCH**

**12:30 PM – 1:30 PM** **The NEPC Secret Sauce**

*A first for the NEPC Client Conference, get an interactive, behind-the-scenes tour of our proprietary investment framework through case studies, including private markets, public markets and hedge funds.*

Sarah Samuels, CFA, CAIA – Partner, Head of Investment Manager Research, NEPC

**1:30 PM – 2:30 PM** **A Fireside Chat with Tim McCusker and Rick Rieder**

Tim McCusker, FSA, CFA, CAIA – Partner, Chief Investment Officer, NEPC

Rick Rieder – CIO of Global Fixed Income and Head of Global Allocation Investments, BlackRock

**2:30 PM – 2:45 PM** **NETWORKING BREAK**

**2:45 PM – 3:30 PM** **Market Actions, OCIO Reactions**

*A lively discussion around NEPC's market themes and outlook, and their implementation within OCIO client portfolios.*

Phill Nelson, CFA – Partner, Head of Asset Allocation, NEPC

Scott Perry, CAIA – Partner, Head of OCIO & Portfolio Strategy, NEPC

**3:30 PM – 4:30 PM** **"Humanity's New Dawn"**

*A past, present, and future look at Artificial Intelligence. It spells out where we are, how we got here, where we're going and how you can prepare.*

Zack Kass – Leading Expert in AI; Former Head of Go-To-Market, OpenAI

**4:30 PM – 5:30 PM** **HAPPY HOUR – Sponsored by Backstop Solutions**

**6:00 PM – 9:00 PM** **GROUP DINNERS**

# TUESDAY, SEPTEMBER 10

**6:00 AM – 7:00 AM** **HIIT + Sunrise Yoga**

*Enjoy a complimentary high-intensity interval training (HIIT) and soothing yoga session led by NEPC's very own, Emma Andrews. It's not just a workout; it's a transformative journey for your mind, body, and spirit. No fancy gear needed—just bring yourself and get ready to recharge your energy and rejuvenate your soul.*

**A Run, Jog or Walk Through Scenic Boston**

*Join NEPC's Lindsay Powers for a 3.5-mile journey through the streets of Copley Square to the Charles River! Whether you prefer to run, jog, or walk, this scenic excursion guarantees a fantastic workout while showcasing the beauty of the city. All fitness levels and abilities are welcome, so lace up your shoes and get ready to explore Boston's iconic landmarks. Route maps will be provided beforehand.*

**8:15 AM – 9:00 AM** **BREAKFAST**

**9:00 AM – 9:05 AM** **Opening Remarks**

Steve Charlton, CFA – Partner, Head of Client Solutions, NEPC

**9:05 AM – 10:00 AM** **A View from Washington**

*During this session, Libby will share PIMCO's views and insights on the 2024 election, expectations for the policymaking environment, and importantly, the potential impact of politics on investment portfolios and the economy.*

Libby Cantrill, CFA – Managing Director and Head of Public Policy, PIMCO

**10:00 AM – 10:45 AM** **An Investor's Guide to Geopolitical Risk**

*Delve into the macroeconomic and portfolio implications for investors in a world teeming with fragmentation and uncertainty.*

Jennifer Appel, CFA – Senior Investment Director, Asset Allocation, NEPC

**10:45 PM – 10:55 PM** **TRANSITION TO BREAKOUT SESSIONS**

**10:55 AM – 11:40 PM** **Breakout Session A — Passive Investing: Riding the Next Wave**

*A guide to passive investing amid its continuing popularity.*

Kristina Tomasik – Investment Director, NEPC

**Breakout Session B — Manager Selection: Lessons from the Graveyard**

*Learn from the mistakes of managers that didn't make it and invest in a strategy that will withstand the test of time.*

Alex Rickels, CFA – Investment Director, NEPC

Rosann Halleran – Senior Investment Director, NEPC

**Breakout Session C — Distressed Real Estate Investing: Opportunities and Strategies**

*An exploration of the different investment opportunities across capital structure, property sectors and geographies, and their successful execution.*

Moderator: Shelley Santulli – Principal, Senior Investment Director, Real Assets, NEPC

Speakers: Todd Liker – Managing Director and Co-Portfolio Manager, Oaktree Capital Management;

Kathleen McCarthy – Global Co-Head of Blackstone Real Estate, Blackstone Inc.;

Thomas E. Wagner – Head of North American Real Estate and Senior Managing Director, Cerberus Capital Management

**Breakout Session D — Diversifying Portfolio Risk**
*An insight into NEPC's tried and tested approaches to effectively diversifying portfolios.*

Kadmiel Onodje, CAIA – Senior Investment Director, NEPC

Kyan Nafissi, CFA – Investment Director, NEPC

**11:40 PM – 12:30 PM** **LUNCH**

**12:30 PM – 12:40 PM** **TRANSITION TO BREAKOUT SESSIONS**

**12:40 PM – 1:25 PM** **Breakout Session A — The Great AI Race**
*An exploration of the competitive AI landscape and its impact on investment portfolios, economic productivity and growth.*

Andrew Pettersen, CFA – Senior Investment Director, NEPC

Andrew Heiskell – Global Equity Strategist, Partner, Wellington

Santo Politi – Founder and Managing Partner, Spark Capital

Lu Zhang – Founder and Managing Partner, Fusion Fund

**Breakout Session B — Fireside Chat: Perspectives and Innovation in Pension Management**
*An insight into Arizona State Retirement System's governance, risk approach, and Contribution Prepayment Program (CPP) – a pioneering approach to pension obligation management that offers budget flexibility through changing financial conditions.*

Rose Dean, CFA – Partner, NEPC

Paul Matson – Executive Director, Arizona State Retirement System

**Breakout Session C — Are We Getting Too Personal?**

*A breakdown of how managed account providers use (or don't use) different inputs when constructing portfolios for participants.*

Mikaylee O'Connor – Principal, Head of DC Solutions, NEPC

Will Stanco – Senior Consulting Analyst, NEPC

**Breakout Session D — The Great Debate: What to do with your Fully Funded Pension Plan**
*A discussion of the various ways to manage assets and liabilities, including new and unique strategies and risks.*

Moderator: Aaron Chastain, CFA – Principal, Senior Consultant, NEPC;

Speakers: Janis Kane, CFA, FSA, EA – Director of LDI Solutions, NEPC;

Jeff Stevenson – President and CEO, October Three;

Amy Trainor, FSA – Senior Managing Director, Partner, Multi-Asset Strategist, and Portfolio Manager, Wellington Management

**1:25 PM – 1:35 PM** **TRANSITION TO BREAKOUT SESSIONS**

**1:35 PM – 2:10 PM** **Breakout Session A — Navigating GP & LP Liquidity Solutions**
*A close look at the different ways general partners are creating liquidity in a higher interest-rate environment.*

Nick Mann – Principal, Senior Investment Director, Private Markets, NEPC;

Kumber Husain – Managing Director for Audax Strategic Capital;

Chris Jaroch – Senior Managing Director at Newbury Partners;

Lindsay Sharma – Managing Director, Industry Ventures

**Breakout Session B — An Evolutionary Tale: The Past, Present and Future of Infrastructure Investing**
*A discussion on the role of infrastructure as an asset class and potential investment opportunities.*

Larissa Davy – Senior Investment Director, NEPC

**Breakout Session C — Is There a Bubble in Private Debt?**
*An examination of the private debt market.*

Oliver Fadly – Partner, Head of Private Debt Investments, NEPC;

Colton Lavin, CFA – Investment Director, NEPC;

Akila Grewal – Partner in Client and Product Solutions, Apollo

**Breakout Session D — Unlocking Opportunities: The Power of Global Equity Investing**
*A discussion with seasoned professionals on investing globally and how to navigate the volatility around higher rates and geopolitics.*

Moderator: Nedelina (Nina) Petkova – Senior Investment Director, NEPC

Speakers: Rajiv Jain – Chairman and CIO, GQG Partners;

James Reichert, CFA – Partner and Senior Director of Portfolio Strategy, NEPC

**2:10 PM – 2:20 PM** **TRANSITION TO BREAKOUT SESSIONS**

**2:20 PM – 3:00 PM** **A Fireside Chat with Orlando Bravo**

Orlando Bravo – Founder and Managing Partner, Thoma Bravo

**3:00 PM – 3:05 PM** **Closing Remarks**

Steve Charlton, CFA – Partner, Head of Client Solutions, NEPC

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