



# 2019 CHIEF OFFICERS SUMMIT

*Where Leaders Engage*

June 12 – 14, 2019  
Westin Michigan Avenue Chicago  
Chicago, IL

## CIO SUMMIT FINAL AGENDA\*

### WEDNESDAY, JUNE 12

4:00 pm – 6:00 pm    **REGISTRATION**

5:00 pm – 6:00 pm    **WELCOME RECEPTION**

### THURSDAY, JUNE 13

7:00 am – 5:30 pm    **REGISTRATION**

7:00 am – 7:45 am    **BREAKFAST**

7:45 am – 8:00 am    **WELCOME ADDRESS**  
*Hank Kim, Esq., NCPERS*  
*Vijoy Chattergy, NCPERS*

8:00 am – 12:15 pm    **GENERAL SESSION I: CIO LEADERSHIP AND MANAGING INVESTMENT TEAMS**

8:00 am – 8:45 am    *Habits and Traits of Successful Leaders*  
Speaker:            Rick Wartzman, Drucker Institute

8:45 am – 9:30 am *Cultivating & Improving CIO Relationships: From Boards to CEOs to Your Staff to Vendors*

Moderator: Christopher DiFusco, CIO, Philadelphia Board of Pensions & Retirement  
Panel: Jabari Porter, CIO, City of Chicago  
Daniel Zito, Executive Director & CIO, Arlington County Employee Retirement System (Invited)  
Public Plan CIO (TBA)

9:30 am – 9:45 am **REFRESHMENT BREAK**

9:45 am – 10:30 am *Communicating amongst the Generations*

Speaker: Phil Gwoke, BridgeWorks

10:30 am – 11:30 am *Recruiting, Retaining, & Mentoring Investment Staff*

Moderator: Rod June, CIO, Los Angeles City Employees Retirement System

Panel: Graham Honda, Pacific Investment Management Company, LLC  
Jonathan Grabel, CIO, Los Angeles County Employees Retirement Association (Invited)

11:30 am – 12:15 pm Facilitated Small Group Discussions

12:15 pm – 1:30 pm **NETWORKING LUNCH**

1:30 pm – 5:30 pm **GENERAL SESSION II: INVESTMENT MATTERS**

1:30 pm – 2:30 pm *Infrastructure Financing & Investments: Alternative Models*

Speaker: Clive Lipshitz, Tradewind Interstate Advisors  
David Seltzer, Mercator Advisors

2:30 pm – 3:30 pm *Private Equity*

Speaker: David Turkington, State Street Associates

3:30 pm – 3:45 pm **REFRESHMENT BREAK**

3:45 pm – 4:45 pm *The Pros & Cons of Portfolio Complexity*

Moderator: Angela May-Miller, Chicago Teachers' Pension Fund (CTPF)

Panel: Stephen Edmundson, Public Employees' Retirement System of Nevada  
Fadi BouSamra, Nashville (Invited)

4:45 pm – 5:30 pm Facilitated Small Group Discussions

6:30 pm – 9:00 pm **NETWORKING RECEPTION & DINNER**

## FRIDAY, JUNE 14

7:00 am – 12:00 pm **REGISTRATION**

7:00 am – 8:00 am **BREAKFAST**

8:00 am – 11:45 am **GENERAL SESSION III: INVESTMENT MATTERS (continued)**

8:00 am – 9:00 am *Diversity: External and Internal*

Moderator: Angela May-Miller, CIO, Chicago Teachers' Pension Fund

Panel: Sam Austin, NEPC

Carmen Ortiz-McGhee, National Association of Investment Companies  
Ajit Singh, CIO, Houston Firefighters' Relief & Retirement Fund (Invited)  
FIS (Invited)

9:00 am – 10:00 am *Practical Advice on Divestment*

Moderator: Christopher DiFusco, Philadelphia Board of Pensions and Retirement

Panel: Jason Malinowski, CIO, Seattle City Employees' Retirement System

Jabari Porter, CIO, City of Chicago

Rodrigo Garcia, Deputy Treasurer/CIO State of Illinois

10:00 am – 11:00 am *Getting More Value from Your Investment Consultants*

Moderator: Jason Malinowski, Seattle City Employees Retirement System

Panel: Marc Friedberg, Wilshire Private Markets

Sue Crotty, Segal Marco Advisors

Kweku Obed, Marquette Associates

11:00 am – 11:45 am Facilitated Small Group Discussions

11:45 am – 12:30 pm **NETWORKING LUNCH**

12:30 pm – 2:45 pm **GENERAL SESSION IV: RETIREMENT INDUSTRY TRENDS & PERSPECTIVES**

12:30 pm – 1:15 pm *Trends in Investment Governance*

Speakers: Mark Higgins, RVK

Greg Kantor, RVK

1:15 pm – 2:00 pm *What Explains Differences in Public Pension Returns Since 2001?*

Speaker: Jean-Pierre Aubry, Center for Retirement Research at Boston College

2:00 pm – 2:45 pm *Impacts of Legislation & Regulations on Assets & Asset Owners*

Moderator: Hank Kim, NCPERS

Panel: Ken Burtsch, Council of Institutional Investors  
Chris Hayes, International Limited Partners Association

2:45 pm – 3:00 pm **2020 CIO SUMMIT PLANNING & CLOSING REMARKS**

Hank Kim, NCPERS

Vijoy Chattergy, NCPERS