



2019 CIO SUMMIT

Building a Community to Meet Our Challenges

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

PRELIMINARY 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: *A successful leader of a Chicago-based company (TBA)*

8:45 am – 9:30 am Cultivating & Improving CIO Relationships: From Boards to CEOs to Your Staff to Vendors
Moderator: *Christopher DiFusco, Philadelphia Board of Pensions & Retirement*
Panel: *Paul Matson, Arizona State Retirement System (Invited)*
Stan Rupnik, TRS of Illinois (Invited)
Michael Walsh, Laborers' Annuity & Benefit Fund of Chicago (Invited)

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, LACERS*
Panel: *Graham Honda, PIMCO*
Sam Masoudi, Wyoming Retirement System (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 Getting More Value from Your Investment Consultants
Moderator: *Jason Malinowski, Seattle City Employees' Retirement System*
Panel: *Investment Consultant 1*
Investment Consultant 2
Investment Consultant 3

2:30 pm – 3:30 pm The Pros & Cons of Portfolio Complexity
Moderator: *Angela May-Miller, Chicago Teachers' Pension Fund*
Panel: *Bob Maynard, PERSI (Invited)*
Don Pierce, SBCERA (Invited)

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

3:45 pm – 4:45 pm Private Equity
Speaker: *William Kinlaw, State Street Associates (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, CTPF*

Panel: *Thomas Lee, NYSTRS (Invited)*

NEPC (Invited)

Attucks (Invited)

FIS (Invited)

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

Moderator: *Christopher DiFusco, PBPR*

Panel: *William Coaker, SFERS (Invited)*

Jason Malinowski, SCERS

Sheila Morgan-Johnson, DCRB (Invited)

10:00 am – 11:00 am The Role of Diversifying Strategies

Speaker: *Tim Price, CCCERA (Invited)*

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 (Invited)

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

Moderator: *Hank Kim, NCPERS*

Panel: *Ken Burtsch, CII (Invited)*
Chris Hayes, ILPA (Invited)

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

Hank Kim, NCPERS

Vijoy Chattergy, NCPERS