

Program as of 2-23-23



# Academy for Institutional Investors

## **A Gathering Place for the Best & Brightest Investment Minds!**

Educational Forums that Inspire a Culture of Collaboration, Community & Friendship  
Among Endowments, Foundations, Pensions, Hospitals, Family Offices,  
Consultants and Asset Managers

**May 22-23, 2023**  
**Spring Investment Academy Forum**  
**The St. Regis Hotel**  
**Atlanta, Georgia**

**FOR MORE INFORMATION ON BECOMING PART OF OUR COMMUNITY:**  
<https://www.academyforinstitutionalinvestors.org/>

SPRING INVESTMENT ACADEMY FORUM; THE ST. REGIS HOTEL, ATLANTA, GA; MAY 22-23, 2023



## AII EDITORIAL COMMITTEE



**J.P. Boyd**  
Director of  
Investments  
Golden LEAF  
Foundation



**Mary Cahill**  
CEO & CIO  
Acansa  
Investment  
Management  
Group



**Mike Condon**  
Head of Portfolio  
Management  
Fund Evaluation  
Group (FEG)



**Celia Dallas**  
Chief Investment  
Strategist  
Cambridge  
Associates



**Christopher Dion**  
Chief Investment  
Officer  
Lowe,  
Brockenbrough &  
Company



**Jim Dunn**  
CEO & CIO  
Verger Capital  
Management



**Robert Durden**  
CEO/CIO  
UVIMCO



**Claire Fefer**  
Investment  
Manager  
DUMAC (Duke  
University)



**Susanne Gealy**  
Senior Director  
CommonSpirit  
Health



**Libby George**  
Former, Director  
of Investments  
NC State  
University



**David Gilmore**  
Chief Investment  
Officer  
The Harry and  
Jeanette  
Weinberg  
Foundation



**Michael Hennessy**  
Managing  
Director,  
Investments  
Morgan Creek  
Capital  
Management



# Academy for Institutional Investors

## AII EDITORIAL COMMITTEE



**Brian Hiestand**  
Chief Investment Officer  
1693 Management Company  
(subsidiary of College of William & Mary Foundation)



**Ray Jacobson**  
Chief Investment Officer  
Davidson College



**Dana Johns**  
Senior Portfolio Manager, Private Equity  
Maryland State Retirement & Pension System



**Beth Johnson**  
Partner, Not-for-Profit Investment Practice  
Mercer Investment Consulting



**Kris Kapoor**  
Chief Investment Officer  
Bakala Capital



**Christine Kelleher**  
Chief of Investments  
National Gallery of Art



**Larry Kochard**  
Chief Investment Officer  
Makena Capital Management



**Nina Lesavoy**  
Founder  
Avec Capital



**Katherine Molnar**  
Chief Investment Officer  
Fairfax County Police Officers Retirement System



**Muthu Muthiah**  
Chief Investment Officer  
Children's Healthcare of Atlanta (CHOA)



**Brian Neale**  
Chief Investment Officer  
University of Nebraska Foundation



**Kate Nevin**  
President & Portfolio Manager  
TSW



## AII EDITORIAL COMMITTEE



**Mark E. Roberts**  
Chief Investment  
Officer  
Ironsides Asset  
Advisors



**Liza Scott**  
Assistant  
Treasurer/  
Director of Asset  
Management  
Dominion Energy,  
Inc.



**Anne Shelton**  
Chief Investment  
Officer  
American Trading  
& Production  
Corp.



**Adela Skenderasi**  
Partner &  
Portfolio Manager  
Brown Advisory



**Donna L. Snider**  
Chief Investment  
Officer  
Hackensack  
Meridian Health



**Mark Steed**  
Chief Investment  
Officer  
Arizona PSPRS  
Trust



**Emily Sumner**  
Chief Investment  
Officer  
Gilder Office for  
Growth



**Daniel Ward**  
Associate VP for  
Finance and  
Portfolio Manager  
Virginia Tech  
Foundation



**Mel Williams**  
General Partner  
TrueBridge  
Capital

### ***THANK YOU FOR YOUR FRIENDSHIP AND COMMITMENT TO OUR MISSION!***

The Editorial Content Committee help set the direction and develop the cutting-edge timely topics and themes for all programming. The Committee assists the Academy in the recruitment of speakers, drives the development of the content, helps select the manager members and acts as an informal advisory board and strategic resource. Our goal as a committee is to keep the investment community abreast of industry practices on a “real-time” basis and to sharpen the understanding of critical factors impacting long-term investment ideas leading to better returns. Academy for Institutional Investors (AII) helps allocators to make more informed portfolio decisions by connecting them in-person with their peers from similar institutions. Members can always speak candidly because we **prohibit the press** from attending our programs allowing asset owners and the speaker faculty to share confidential information while on stage or leading small groups. Editorial Committee Members do their best to participate in at least one Academy forum each year.

## Co-Chairs



**Andrea Szigethy,**  
Founder & CEO of  
Academy for  
Institutional  
Investors



**Muthu Muthiah**  
Chief Investment  
Officer  
Children's Healthcare of  
Atlanta (CHOA)



**Beth Johnson,**  
Partner, Not-for-Profit  
Investment Practice  
Mercer Investment  
Consulting

## Keynote Speakers



**Dan Clifton**  
Partner & Head of  
Policy Research  
Strategas Securities



**Rod Collins**  
Keynote Speaker &  
Author, *Wiki  
Management: A  
Revolutionary New  
Model for a Rapidly  
Changing and  
Collaborative World*



**Marko Papic**  
Partner & Chief  
Strategist  
Clocktower Group



**Caroline M. Poland**  
MA, LMHC, LCAC, CCTP,  
CCFP, NCC, Founder  
and CEO  
Poland and Associates  
Consulting



**Dr. Gregory Poland, M.D.**  
Director Vaccine  
Research Group, Mayo  
Clinic, Mary Lowell  
Leary Emeritus  
Professor of Medicine,  
Distinguished  
Investigator of the Mayo  
Clinic; Editor-in-Chief  
for the journal *VACCINE*



**Stephanie Pomboy**  
Founder & President  
MacroMavens



**Dr. Terry L. Root**  
Senior Fellow  
(University Faculty)  
Emerita  
Woods Institute for the  
Environment at  
Stanford University



**Mark W. Yusko**  
CEO & Chief Investment  
Officer  
Morgan Creek,  
Managing Partner,  
Morgan Creek Digital

# Speaker Faculty



**Travis Angevine**  
Managing Director  
of Public Markets  
Alfred I. duPont  
Charitable Trust



**Liz Baldwin**  
Co-Interim Chief  
Investment Officer  
Mass General  
Brigham



**Brad Briner**  
Co-Chief Investment  
Officer  
Willett Advisors



**Elizabeth Burton**  
Managing Director,  
Client Investment  
Strategist  
Goldman Sachs  
Asset Management



**Celia Dallas**  
Chief Investment  
Strategist  
Cambridge  
Associates



**Robert Durden**  
CEO & CIO  
UVIMCO



**Temple Fennell**  
Co-Founder &  
Managing Partner  
Clean Energy  
Ventures & Keller  
Enterprises, LLC



**Grady Frank**  
Partner & Head of  
Private Credit  
Origination  
GoldenTree Asset  
Management



**Libby George**  
Consultant  
ClearView Fiduciary  
Alliance



**David Gilmore**  
Chief Investment  
Officer  
The Harry and  
Jeanette Weinberg  
Foundation



**Terry Gottberg**  
Chairman, President,  
& CEO  
Merit Energy  
Company



**George J.  
Hauptfuhrer, CFA**  
Consultant  
Prime Buchholz



**Ray Jacobson**  
Chief Investment  
Officer  
Davidson College



**David Jeffrey**  
Partner, Head of  
Europe  
StepStone Group



**Christine Kelleher,**  
Chief of Investments  
National Gallery of  
Art



**Ken Lee**  
Chief Investment  
Officer  
Children's Health



**Brian Neale**  
Chief Investment  
Officer  
University of  
Nebraska  
Foundation



**Ben Pierson**  
President & Chief  
Investment Officer  
Sherwood Family  
Office



**John Pinkel**  
Portfolio Manager &  
Partner  
Indus Capital



**Joe Schorge**  
Managing Partner  
Isomer Capital



**Erik Sebusch**  
Partner  
Global Strategy  
Leader Venture  
Capital & Growth  
Equity, Mercer  
Investment  
Consulting



**Adela Skenderasi**  
Partner & Portfolio  
Manager  
Brown Advisory



**Donna L. Snider**  
Chief Investment  
Officer  
Hackensack  
Meridian Health



**Kyle Stewart**  
Investment Director  
Children's Health



**Emily Sumner**  
Chief Investment  
Officer, Investment  
Committee Chair  
Gilder Office for  
Growth



**Peter Troob**  
Co-Head  
TF Investments



**Boaz Weinstein**  
Founder & Chief  
Investment Officer  
Saba Capital  
Management



**John Wolf**  
Chief Investment  
Officer  
Insight Partners  
Public Equities



*THANK YOU TO OUR WONDERFUL SPRING FORUM SPONSORS FOR YOUR COLLABORATION, CONTRIBUTION & COMMITMENT TO THE INSTITUTIONAL INVESTOR COMMUNITY!*

**FEATURED LEAD SPONSORS**



**COLLABORATING SPONSORS**



MERIT ENERGY COMPANY

**CONTRIBUTING SPONSORS**



SECURITIES

**OTHER SUPPORTERS**



CFA Society  
North Carolina



## DAY ONE - MONDAY, MAY 22, 2023

**10:00 am – 10:45 am**

**Main Registration & Networking for All Members at the St. Regis Hotel, Atlanta, GA**

**Website:** <https://www.marriott.com/en-us/hotels/atlxr-the-st-regis-atlanta/overview/>

**Address:** Eighty-Eight West Paces Ferry Road NW, Atlanta, GA 30305; **Phone:** 404-563-7900

**Closest Airport:** (ATL) Hartsfield-Jackson Atlanta International Airport (*18 miles from the property*)

**10:45 am – 11:00 am**

**Welcome to the Spring Investment Academy Forum 2023**

**Introduction to Forum Co-Chairs**

**Forum Host:**

**Andrea Szigethy, Founder, CEO & President, Academy for Institutional Investors, LLC**

**Spring Forum Co-Chairs:**

**Muthu Muthiah, Chief Investment Officer, Children's Healthcare of Atlanta (CHOA)**

**Beth Johnson, Partner, Not-for-Profit Investment Practice, Mercer Investment Consulting**

**11:00 am to 11:45 am**

**Opening Keynote Address: Geopolitics, Macroeconomics & The Markets**

The macro setup is starting to look very much like 2016...the Fed is backing off from extreme hawkishness and China is stimulating. The proof will be in the pudding, namely on two measures. First, does the US real yield stop appreciating? Second, does Chinese TSF pickup? Beijing has officially its zero-COVID-19 policy due to growing material constraints. In addition, Chinese policymakers are providing stronger stimulus to the property sector, while attempting to further pull back from its regulatory crackdown on Internet platforms. Will the macro tailwinds benefiting Latin America – multipolarity, deglobalization, and a commodity super cycle strengthen Indonesia's geopolitical and macroeconomic position in the coming years? What are the three most concerning geopolitical risks expected in the next 12 months? In this keynote opening session Marko Papic will analyze the landscape to identify the most important events that investors should be paying most attention to.

**Keynote Speaker: Marko Papic, Partner & Chief Strategist, Clocktower Group**

**11:45 am – 12:30 pm**

**Keynote Address: Implications of the Fed's Latest Policy Blunder for the Economy**

A decade of ruthlessly repressive interest-rate policy has built up unprecedented imbalances in financial markets, leaving the US economy more vulnerable to any downside than it has ever been prior. Seemingly oblivious to this dismal reality, the Fed has undertaken the most aggressive tightening since Paul Volker. While they imagine they can engineer a soft landing, there's every reason to expect this downturn will give 2008 a run for the money. Stephanie Pomboy is the founder and president of MacroMavens. Stephanie has earned the reputation for calling major macro developments well ahead of the curve.

**Keynote Speaker: Stephanie Pomboy, Founder & President, MacroMavens**





## **DAY ONE - MONDAY, MAY 22, 2023 (Continued)**

**12:30 pm – 1:00 pm**

**A Conversation with our Morning Keynote Presenters (Marko Papic & Stephanie Pomboy)**

**Interviewer:** David Jeffrey, Partner, Head of Europe, StepStone Group

**1:00 pm – 2:15 pm**

**Networking Luncheon**

**2:15 pm – 3:00 pm**

**Strategic Asset Allocation – Preparing Your Portfolio for Recession**

Many economists are predicting that a global recession is inevitable in 2023 and some are even going as far as preparing what they call an economic hurricane. What have institutional investors learned from the past few years of the pandemic and how are investors re-positioning portfolios to protect themselves for the future. What long-term opportunities are investors seeing today? What role should private and public investments play in your portfolio and what lessons have we learned from the past? How do you think about risk/reward in the public and private markets today as we look out over the next few years? What is the most optimal way to gain exposure to both traditional and alternative asset classes? How are allocators and investment managers approaching asset allocation, portfolio construction and risk management today differently?

**Moderator:** George J. Hauptfuhrer, CFA, Consultant, Prime Buchholz

**Panelists:** Christine Kelleher, Chief of Investments, National Gallery of Art

**Ben Pierson, President & Chief Investment Officer, Sherwood Family Office**

**Adela Skenderasi, Partner & Portfolio Manager, Brown Advisory**

**John Wolff, Chief Investment Officer, Insight Partners Public Equities**

**3:00 pm – 3:30 pm**

**Fireside Chat Interview: The Opportunity Set in Asia**

**Interviewer:** Celia Dallas, Chief Investment Strategist, Cambridge Associates

**Guest Speaker:** John Pinkel, Portfolio Manager & Partner, Indus Capital

**3:30 pm – 4:00 pm**

**LP/GP Fireside Chat: The Energy Evolution**

This discussion will be given from both the LP and GP perspective. Ken Lee from Children's Healthcare of Dallas will interview industry expert Terry Gottberg from Merit Energy on the history of the industry, what has been changing and how they think about ESG etc. Then they will turn the tables and Terry will interview Ken on ESG Policy, E&F Value and how the momentum in Dallas is changing investment programs. This will be a lively interactive discussion between the two and they will leave some time for audience questions.

**Interviewer:** Ken Lee, Chief Investment Officer, Children's Healthcare of Dallas

**Guest Speaker:** Terry Gottberg, Chairman, President & CEO, Merit Energy Company

**4:00 pm – 4:30 pm**

**Afternoon Networking Break**



## **DAY ONE - MONDAY, MAY 22, 2023 (Continued)**

**4:30 pm – 5:30 pm**

### **Keynote Address: Work-Life Balance: Integrating a Successful Life and Career**

This session will be presented through the eyes of a successful academic physician (father) and a successful mental health counselor and small business owner (daughter). Dr. Gregory Poland the Director of the Vaccine Research Group at Mayo Clinic, and his daughter Caroline Poland, a mental health provider, will co-lead this discussion together. Success in work demands a great deal of time, energy, and focus throughout our life. To engage in work well, and to have a successful career and healthy life, we must establish healthy rhythms as we integrate our work and life in healthy, meaningful, and successful ways. This talk will discuss important topics that you need to know about in setting up rhythms for a healthy life, including the work you engage in, as well as exploring key concepts surrounding burnout (and what you need to do to protect yourself against burnout throughout your career).

#### **Keynote Speakers:**

**Dr. Gregory Poland, M.D., Director Vaccine Research Group, Mayo Clinic, Mary Lowell Leary Emeritus Professor of Medicine, Distinguished Investigator of the Mayo Clinic; Editor-in-Chief for the journal *VACCINE***

**Caroline M. Poland, MA, LMHC, LCAC, CCTP, CCFP, NCC, Founder and CEO, Poland and Associates Consulting, LLC**

**5:30 pm – 6:15 pm**

### **The Aftermath of Hurricane Sam & What it means for Institutional Investors (The Downfall of FTX, SBF & Alameda Research)**

**Keynote Speaker: Mark W. Yusko, CEO & Chief Investment Officer, Morgan Creek Capital Management & Managing Partner, Morgan Creek Digital**

**6:30 pm – 10:00 pm**

### **Networking Welcome Reception & Dinner Party**

**MONDAY, MAY 22, 2023**

**Networking Welcome Reception & Dinner Party!**

**6:30 pm – 10:00 pm at KING + DUKE**

**Located directly Next Door to the St. Regis Hotel**

You don't want to miss this special evening planned by The Academy for Institutional Investors and our Forum Sponsors! Come hungry as there will be plenty of dinner options and cocktails to enjoy! Our welcome reception & networking dinner party is a time dedicated to having fun in a casual atmosphere and catching up with old friends while making many new connections with everyone in our AII Community! Grab some friends and walk over to the restaurant located directly next door to the St. Regis Hotel. Come join us for a special evening of fun!



## **DAY TWO - TUESDAY, MAY 23, 2023**

### **7:30 am – 8:50 am - Allocator “Closed Door” Breakfast Meet-Up at The St. Regis Hotel**

This closed-door breakfast session creates the opportunity for LPs to come together to discuss the challenges they face and brainstorm solutions in an intimate, informal atmosphere. The interactive format allows time for candid conversations and enables participants to collaborate with one another. This is a great time for allocators to reconnect with one another and meet new members.

#### **Breakfast Table Leaders:**

**Liz Baldwin, Co-Interim CIO, Mass General Brigham**

**Celia Dallas, Chief Investment Strategist, Cambridge Associates**

**Libby George, Consultant, ClearView Fiduciary Alliance**

**Ray Jacobson, Chief Investment Officer, Davidson College**

**Beth Johnson, Partner, Not-for-Profit Investment Practice, Mercer Investment Consulting**

**Emily Sumner, Chief Investment Officer, Gilder Office for Growth**

### **9:00 am – 10:00 am**

#### **Opening Day Two Keynote Address:**

#### **The Shifting Monetary, Fiscal, and Geopolitical Frameworks**

For the past thirty years investors have benefited from the tailwinds of low inflation, low interest rates, accommodative fiscal policy, and globalization. But policy shocks in the past three years are reversing each one of these frameworks. Inflation has to be removed from the system for the first time since 1982, the debt servicing cost of the US government is expected to hit its highest level in more than 30 years this year, and China is pushing for a multipolar world. This year's investment outlook will be shaped by how policymakers respond to these policy shocks with national security taking precedence over economic efficiency, the Fed coming under pressure from elected officials as the US economy slows, and deficit politics returning to the US Capitol with the June/July debt ceiling as the catalyst for brinkmanship. This year's conference is lined up almost perfectly for the Congressional debate about the debt ceiling which will be a major market event. Altogether, policy is shifting back to the period before the Berlin Wall came down and that requires an adjustment from investors in terms of asset allocation. Discussion will focus on macro and sector policy changes, how these changes impact the economic and investment environment, and conclude with specific investment recommendations.

**Keynote Speaker: Dan Clifton, Partner & Head of Policy Research, Strategas Securities**

### **10:00 am – 10:40 am**

#### **Risks & Opportunities of Investing the Private Credit Markets**

What are some of the issues facing borrowers today? What kinds of yields are we seeing in private credit relative to public? At what part of the market cycle does the size of the deal matter? How has the recent market volatility impacted the private credit markets? Does it make it better or worse for private credit? What are some of the risks we are seeing today? The panelists will discuss some of the most critical factors you need to think about when investing in private credit across a wide spectrum, including traditional direct lending, distressed debt, and opportunistic credit.

**Moderator: Brian Neale, Chief Investment Officer, University of Nebraska Foundation**

**Panelists: Grady Frank, Partner & Head of Private Credit Origination, GoldenTree Asset Management**

**Kyle Stewart, Investment Director, Children's Health**

**Peter Troob, Co-Head, TF Investments**



## DAY TWO - TUESDAY, MAY 23, 2023 (Continued)

**10:40 am – 11:10 am**

**Morning Break**

**11:10 am – 11:50 am**

### **US vs. Europe: Early-Stage Venture Capital Opportunities**

This session will touch on the VC landscape in both Europe and the US and the opportunities and challenges that come about when trying to find some of the smaller, more specialized funds that are typically the most successful. How do LPs find these companies and invest in them early? Where can investors find co-investing opportunities? What should institutional investors look for in an innovative company? How could an investor identify and access the “next big opportunity” in different countries and sectors? This session will also provide a current outlook for clean tech investing. Our panelists will debate U.S vs. European opportunities.

**Moderator:** Erik Sebusch, Partner, Global Strategy Leader Venture Capital & Growth Equity, Mercer Investment Consulting

**Panelists:** Temple Fennell, Co-Founder & Managing Partner, Clean Energy Ventures & Keller Enterprises, LLC

Joe Schorge, Founding & Managing Partner, Isomer Capital

**11:50 am – 12:20 pm**

### **Fireside Chat: The CIO Perspective (Compliments of TD Prime Services)**

**Interviewer:** Elizabeth Burton, Managing Director, Client Investment Strategist, Goldman Sachs Asset Management

**Special Guest Speaker:** Boaz Weinstein, Founder & Chief Investment Officer, Saba Capital

**12:20 pm – 1:10 pm**

### **Keynote Address: The Impact of Climate Change on our Future**

Dr. Terry L. Root will discuss what we have already seen; climate change in the future and its impact on plants, animals, humans, the environment, etc. and what we can still do to fix it. Dr. Root is Senior Fellow (University Faculty) Emerita in Stanford’s Woods Institute for the Environment at Stanford University. She was a lead author of the Intergovernmental Panel for Climate Change 4th Assessment Report that in 2007 was co-awarded the Nobel Peace Prize with Vice President Al Gore. Also, she was a lead author for the 3rd Assessment Report (2001) and a Review Editor for the 5th Assessment Report (2014). In addition to other honors, Root was awarded the Spirit of Defenders Award for Science by Defenders of Wildlife in 2010, and Lifetime Achievement Award in 2016 from the conservation organization Point Blue. She has served on the boards and as science advisor to several non-governmental organizations, including the National Audubon Board from 2010 through 2019. Currently, she is on the board of Defenders of Wildlife, Renewable Energy Wildlife Institute, and Birds Caribbean. Root earned her undergraduate degree in Mathematics and Statistics from the University of New Mexico, her master’s degree in Biology from the University of Colorado and her doctorate in Biology from Princeton University. She was a Professor at the University of Michigan for 15 years, when she moved to Stanford University where she was on the faculty for another 15 years.

**Keynote Speaker:** Dr. Terry L. Root, Senior Fellow (University Faculty) Emerita, Woods Institute for the Environment at Stanford University



## DAY TWO - TUESDAY, MAY 23, 2023 (Continued)

**1:10 pm – 2:10 pm**

**Networking Luncheon**

**2:10 pm – 3:00 pm**

### **Everyone, Everywhere, All The Time: Reflections on the COVID-19 Pandemic, the Circle of Least Confusion, and the Real Issues Uncovered**

The COVID-19 pandemic has been the deadliest pandemic in modern history. Currently 1 out of every 290 Americans have died from COVID-19. In this talk, Dr. Poland will provide reflections from scientific, philosophical, psychological, and economic points of view on the ongoing COVID-19 pandemic, and predict what it means for the immediate and long-term future. In particular, our keynote speaker will provide a critique of how the pandemic was handled, discuss lessons learned, and speculate as to whether we are likely to implement these lessons in preparing for the next pandemic.

**Keynote Speaker: Dr. Gregory A. Poland, M.D., Director Vaccine Research Group, Mayo Clinic; Mary Lowell Leary Emeritus Professor of Medicine, Distinguished Investigator of the Mayo Clinic, Editor-in-Chief for the Journal *VACCINE***

**(Cocktails & Snacks will be Provided in the back of the ballroom during the late afternoon sessions)**

**3:00 pm – 3:45 pm**

### **Mentoring, Retaining & Developing Your Investment Team for Future Success**

Being a CIO today is not just about making investment decisions, it includes managing a team of professionals and running a business. What makes a great leader? A great leader is one who wants their junior team to be so attractive to other organizations that they would get hired anywhere. Some CIOs have taken the traditional route to get to where they are today, and others have taken a much more non-traditional way. How are CIOs at endowments, foundations, pensions, hospitals and family offices preparing their internal teams through mentorship and creating a path for the younger generation to eventually become future CIOs whether at their own institution or another organization? What important skills, and personality traits does one look for in hiring a new investment team member and how do you retain top talent once you have them? With many institutions now having hybrid schedules how are teams staying engaged and adapting to new ways of collaboration? Is flexibility key to retaining great investment professionals?

**Moderator: David Gilmore, Chief Investment Officer, The Harry & Jeanette Weinberg Foundation**

**Panelists: Travis Angevine, Managing Director of Public Markets, Alfred I. duPont Charitable Trust**

**Brad Briner, Co-Chief Investment Officer, Willett Advisors**

**Robert Durden, CEO & CIO, UVIMCO**

**Brian Neale, Chief Investment Officer, University of Nebraska Foundation**

**Donna L. Snider, Chief Investment Officer, Hackensack Meridian Health**



## **DAY TWO - TUESDAY, MAY 23, 2023 (Continued)**

**3:45 pm – 4:30 pm**

### **Closing Keynote Address: Nobody is Smarter Than Everybody**

In a rapidly changing world, the central organizational challenge for business leaders is about building and leading highly engaged teams. With the increase in remote working and independent surveys showing that two of every three employees report not being engaged at work, this challenge is becoming more difficult. Learn how a new breed of leaders are achieving extraordinary performance by discovering leadership is a team sport that brings together the leadership talents of everyone on the team. Learn why building smart organizations has more to do with leveraging the collective intelligence of smart teams than amplifying the knowledge of a few smart individuals. Discover how you build a team of highly engaged leaders who continually contribute to your organization's success.

**Keynote Speaker: Rod Collins, Keynote Speaker Author, *Wiki Management: A Revolutionary New Model for a Rapidly Changing and Collaborative World***

**4:30 pm**

**End of the Main Forum**

## **OPTIONAL - POST CONFERENCE OPPORTUNITY FOR LPs & GPs**

**4:45 pm to 6:00 pm**

### **Collective Intelligence Demonstration Session**

*(Limited to the first 50 people who sign-up in advance at our Registration Desk during the Forum. Cocktails will be provided during the beginning of the session for those interested in attending).*

The Collective Intelligence Demonstration Session acquaints participants with a proven facilitated meeting practice that they can use to quickly aggregate the collective intelligence of a diverse group of people with multiple perspectives. This practice is especially useful when a group is under pressure to deliver a solution and is caught in a cycle of endless debate driven by apparently unreconcilable differences among team members. This practice is a reliable way to move a group forward by using the principles of the wisdom of crowds to quickly identify workable common ground and gain insight into how to solve highly complex problems.

**Facilitated By: Rod Collins, Keynote Speaker, Author, *Wiki Management: A Revolutionary New Model for a Rapidly Changing and Collaborative World***



**Andrea Szigethy**  
**Founder, CEO & President**  
**Academy for Institutional**  
**Investors, LLC**

**ABOUT THE ACADEMY FOR INSTITUTIONAL INVESTORS (AII)**

**Academy for Institutional Investors, LLC (AII)** is a boutique, woman owned, **non-commercial educational investment conference provider** offering intimate roundtable discussions (*The Academy's Allocator Investment Huddles*) and mid-sized member forums (*Fall & Spring Forums*) for senior investment decision-makers from leading endowments, foundations, pension funds, healthcare, insurance, single family offices (SFOs), multi-family offices (MFOs), OCIOs, consultants, asset management firms and other financial institutions. The Investment Institute (TII) was originally founded in 2008 specifically to educate institutional investors and managers in North Carolina as well as the surrounding southeastern states. In 2016, TII expanded to include allocators and managers from around the country, while still maintaining a strong emphasis on the southeast where our roots were formed. In March of 2021, Andrea Szigethy decided to re-brand TII to a new name **Academy for Institutional Investors (AII)**. The Academy features some of the most well-known experts, leading asset owners, as well as policy makers, economists, research strategists, leadership authorities, money managers and some of the most prominent institutional investors from around the country bringing them together for face-to-face conversations and debates in unique venues in the Southeast. The programs cover complex issues surrounding the financial industry and the speaker faculty analyzes risk while revealing many opportunities in the current market environment. A hallmark of AII is that the number of allocators who attend will always surpass the number of managers at each program. Exchanging information and "trading notes" with one another at our allocator breakfast discussions, truly sets the Academy apart from other conference organizations. AII limits attendance at our Fall & Spring Member Forums, to enable members to meet everyone while sharing their intellectual knowledge with one another.

**Andrea's Background:**

Andrea is the Founder, CEO & President of Academy for Institutional Investors, LLC. Andrea has been working as an educator in the financial sector bringing investment professionals together for over 23 years. Prior to entering the investment world, Andrea produced pharmaceutical conferences for 4 years where she first realized her love for running events, connecting senior executives with one another, building networks, and researching hot industry topics to develop high quality content for her audiences. Andrea has decades of experience helping her clients to strengthen bonds with one another in a relaxed, friendly, non-sales type of atmosphere, fostering an environment to learn and connect in a way that promotes lifelong relationships, trust, and friendship among one another. High-caliber investment education, sophisticated investor attendees and in-depth fun networking are the key components of The Academy's mission. At the end of every event, you will leave with a head full of new ideas and a handful of new friends that will feel like your extended family year after year. Academy for Institutional Investors (AII) offers new members into our circle of family friends at each event while striving to keep the community to a small niche group of sophisticated investors with a limited number of managers and service providers. Previously, Andrea was a Principal and Director of Marketing and Branding for Morgan Creek Capital Management from 2006-2016 where she led the branding, public relations, client education, events and marketing efforts for the firm. Andrea currently serves on the Strategic Advisory Board for the CFA Society North Carolina and is also one of the founding members of the North Carolina Chapter of 100 Women in Finance. Prior to joining Morgan Creek, Andrea spent six years working at NMS Management, Inc. She managed all aspects of conference production, research and development, sales, marketing and relationship management. Earlier in Andrea's career she worked at North Shore University Hospital in NY as a vocational rehabilitation job coach. Her first job out of college was at Computer Associates based in Long Island, NY. Andrea received her Bachelor of Arts Degree from the State University of New York at Albany and continuing credits towards a Master of Arts in Social Work from Adelphi University. Andrea enjoys spending time with her family and friends at the North Carolina beaches or playing golf with her husband. Andrea is an avid music lover and enjoys going to concerts of any kind. She loves heading back to NYC any chance she gets to see as many Broadway Musicals as possible in one trip!



## Speaker Faculty Biographies

### **Travis Angevine, Managing Director of Public Markets, Alfred I. duPont Charitable Trust**

Travis Angevine joined the Alfred I. duPont Charitable Trust in 2011. His primary responsibilities include developing, sourcing, and executing investment strategies for the Trust's Public Markets portfolio, which includes Public Equity, Absolute Return, and Fixed Income asset classes. Mr. Angevine earned his bachelor's degree in economics from Colgate University and his master's degree in business administration from Rensselaer Polytechnic Institute. He is a CFA® charterholder.

### **Liz Baldwin, Co-Interim CIO, Mass General Brigham**

Liz is the Co-Interim CIO of Mass General Brigham, a hospital system in New England. She joined the investment office in 2013 from Verdis Investment Management in Philadelphia, and she started her career at the Brown University Investment Office. Liz received an AB from Dartmouth and an MBA from Wharton, and she sits on the investment committee of the Massachusetts Health & Hospital Association.

### **Brad Briner, Co-Chief Investment Officer, Willett Advisors**

Brad Briner joined Willett Advisors in 2012 and is the Co-Chief Investment Officer, where he is responsible for real assets and public markets investments, as well as the operations of the business. Willett manages the philanthropic and personal investment assets for Mike Bloomberg. Before Willett, Mr. Briner held positions at Morgan Creek Capital, the UNC Management Company, ArLight Capital and Goldman Sachs. Mr. Briner graduated from the University of North Carolina at Chapel Hill as a Morehead Scholar with a degree in economics with distinction. Mr. Briner also received an MBA with distinction from Harvard Business School. He currently serves on the investment committee for Phillips Exeter Academy, the board of directors of the Boston Omaha Corporation (NYSE: BOC) and the debt affordability advisory committee for the State of North Carolina. Mr. Briner and his wife reside in Chapel Hill, NC with their four children.

### **Elizabeth Burton, Managing Director, Client Investment Strategist, Goldman Sachs Asset Management**

Elizabeth Burton is a managing director and client investment strategist in Client Solutions & Capital Markets within Goldman Sachs Asset Management. She advises institutional clients on their investment strategy and portfolio objectives, working alongside global client advisors and product strategists across public and private markets. Elizabeth joined Goldman Sachs in 2022 as a managing director. Prior to joining the firm, Elizabeth was chief investment officer at the Employees' Retirement System of the State of Hawaii. Before that, she served as a managing director in the Quantitative Strategies Group at the Maryland State Retirement Agency, where she was responsible for the agency's absolute return portfolio and oversaw risk management. Earlier in her career, Elizabeth held leadership positions as an investor, economist, and consultant in asset management as well as fixed income trading. Elizabeth serves on the Board of Directors of the Chartered Alternative Investment Association (CAIA). In addition, she serves on the board of the Hill School. Elizabeth earned a BA in Politics and French from Washington and Lee University in 2004 and an MBA in Finance and Econometrics and Statistics from the University of Chicago in 2011. She is a charterholder of CAIA.

### **Dan Clifton, Partner & Head of Policy Research, Strategas Securities**

Daniel Clifton is a Partner and Head of Policy Research for Strategas Securities. In this capacity, Mr. Clifton evaluates government policy initiatives and its impact on the global economy and financial markets for institutional investors. Daniel and his team have been recognized by Institutional Investor magazine as one to the top Washington policy analysts in their annual survey nine consecutive years. Separately, Mr. Clifton is currently ranked as the #2 analyst on Wall Street for Accounting & Tax Policy in the same survey. Prior to joining Strategas, Mr. Clifton was Executive Director of the American Shareholders Association (ASA), a non-partisan, non-profit organization which analyzes public policy affecting shareholders. In this capacity, Daniel was part of coalitions that successfully lowered capital gains and dividend tax rates to 15 percent, a repatriation tax holiday on foreign source revenue in 2004, and reform of the nation's private-sector pension system. Prior to joining ASA, Mr. Clifton was Federal Affairs Manager for Americans for Tax Reform and served as a senior staff member in two gubernatorial administrations working on economic and fiscal policy issues. Daniel has also worked in various capacities on elections at federal, state, and local levels. Mr. Clifton received both his BA in Urban Planning



and his MS in Public Policy from Rutgers University where he was a Fellow at the Eagleton Institute of Politics and a Harold Martin Fellow for Public Policy.

### **Rod Collins, Keynote Speaker & Author**

#### ***Wiki Management: A Revolutionary New Model for a Rapidly Changing and Collaborative World***

Rod Collins is a leading expert and thought leader on the self-managed organization and the future of business. He is a regular blog contributor on *Substack* where he explores how technological innovations continue to transform the rules for how successful businesses work. He is also the author of *Wiki Management: A Revolutionary New Model for a Rapidly Changing and Collaborative World*, which highlights the innovative tools and practices used by a new breed of business leaders to sustain extraordinary performance in a world reshaped by digital disruption. Rod is the former Chief Operating Executive of the Blue Cross Blue Shield Federal Employee Program, one of the nation's largest and most successful business alliances. Under his leadership, the business experienced its greatest five-year growth period in its 60 year history.

### **Celia Dallas, Chief Investment Strategist, Cambridge Associates**

As Chief Investment Strategist for Cambridge Associates and a Managing Director of the firm, Celia is responsible for formulating our global investment strategy and portfolio construction advice. Since joining Cambridge in 1996, Celia has contributed to a wide range of research initiatives, including serving as one of the main architects of our Risk Allocation Framework and an author of the related report. She is the author of our quarterly publication, *VantagePoint*, in which she shares our house view and advice. Celia is a regular contributor to other research publications, covering a wide range of capital market, asset allocation, and investment planning topics. She is a frequent presenter and discussion moderator at the firm's roundtables and various industry conferences. Before joining Cambridge Associates, Celia was a consultant for Harlan Brown & Co, a competitive intelligence consulting firm. In this position, she researched, wrote, and presented market analysis commissioned by Fortune 500 clients on a variety of consumer and industrial products. She also worked for the Employee Benefit Research Institute (EBRI), where she conducted research and wrote reports on retirement income security issues. Celia has an MBA from the Darden School of Business, University of Virginia and a BA from University of Pennsylvania.

### **Robert Durden, CEO & CIO, UVIMCO**

Robert W. Durden, CFA, is the Chief Executive Officer/Chief Investment Officer of UVIMCO. As CEO, Robert provides leadership for all aspects of UVIMCO's operations and serves as UVIMCO's primary representative to the University, related foundations, and the public. As CIO, Robert is responsible for the investment management of UVIMCO's Long Term Pool, overseeing the asset allocation, portfolio management, risk management, and manager selection activities of the investment staff. Prior to joining UVIMCO, Robert served as Senior Vice President and Chief Investment Officer at Texas Children's Hospital in Houston, where he oversaw the hospital's Foundation and other investment assets, totaling approximately \$3 billion. Robert was previously the Managing Director of Private Investments at Morgan Creek Capital Management, and directed \$4.5 billion of private investments across private equity, energy and natural resources, and real estate. He has also worked with Legg Mason/Western Asset Management, Ritchie Capital Management, and Merrill Lynch's Middle Market M&A group. Robert received a B.A. in economics, magna cum laude, from Princeton University, and an M.B.A. in finance and entrepreneurship, with honors, from the University of Chicago Booth School of Business. Robert is a CFA charterholder.

### **Temple Fennell, Co-Founder & Managing Partner, Clean Energy Ventures & Keller Enterprises, LLC**

Temple Fennell has more than 20 years of experience as an investor and operating executive deploying capital of private investors and family offices in direct investments. Temple founded and operated three companies that were funded by private investors, family offices, and institutional investors (New Enterprise Associates, Oak Investment Partners, Pearson Education and others). Temple most recently served as a full-time strategic advisor for Flagship Ventures, a technology firm that develops technology companies to solve global problems and transform large markets in the energy, water, food and human health sectors. Temple is on the board of the single family office, Keller Enterprises, and active in the family's deal origination and due diligence processes. Keller Enterprises is an active investor in late-stage venture and project finance deals in the renewable energy, sustainable food/agriculture, and waste-to-value sectors. Temple is the co-founder and co-director of the World Economic Forum/Harvard education program "Impact Investing for the Next Generation" at the Kennedy's Center for Public Leadership training Next Gen family office members how to consider impact investments as part of their direct investment strategy. He helps lead the MIT "Visionary Investing" workshops that are conducted in China, England and the U.S. and is a member of MIT's Sustainable Finance Group. He is a frequent speaker on the topic of Direct Investment Strategies at conferences including the World Economic Forum, CFA Institute, China Merchants Bank, Campden Wealth Conferences, Family Office Association and others. Temple began his career as a Management Consultant at KMPG in New

York and as an analyst for leveraged buy-out firm, Clinton Capital Corporation. Mr. Fennell holds a B.S. in Systems Engineering, University of Virginia, and a MBA as a MIT Sloan Fellow at the MIT Sloan School of Management.

### **Grady Frank, Partner & Head of Private Credit Origination, GoldenTree Asset Management**

Grady Frank is a Partner and Head of Private Credit Origination at GoldenTree Asset Management. Mr. Frank is a member of the Private Credit Committee and leads GoldenTree's coverage for private equity sponsors and other sources of private credit opportunities. Prior to joining GoldenTree, Mr. Frank spent 22 years in investment banking. Mr. Frank spent 15 years at Goldman, Sachs & Co. Most recently, Mr. Frank was responsible for managing relationships with many of Goldman's largest private equity clients to provide advisory services and financing solutions. Mr. Frank also spent ten years in Goldman's Leveraged Finance Debt Capital Markets group where he was Head of Healthcare, Consumer Retail, and Middle Market Industry verticals responsible for structuring debt financing solutions for sponsors and corporate issuers. Mr. Frank received a B.S. in Business Administration from Washington & Lee University.

### **Libby George, Consultant, ClearView Fiduciary Alliance, LLC**

Libby joined ClearView in February, 2022 as a Member Consultant. She was the former Director of Investments at North Carolina State University accumulating over 30 years of experience in investment management, corporate, educational, and financial accounting. Libby managed multiple portfolios at NC State with assets in excess of \$2.2 billion including long-term endowment assets invested in a sustainable, responsible, and impactful manner. Libby is currently a member of the John Rex Endowment Board, a member of the APLU (Association of Public and Land Grant Universities) investment committee and a member of the editorial committee of Academy of Institutional Investors. Additionally, she is a former member of the Executive & Steering Committees of the Intentional Endowment Network and a former member of the CAP Trust/UNC 403B Investment Committee. She previously served on the State of North Carolina's Supplemental Retirement Board of Trustees and was the Chair of the Investment Subcommittee. Libby was named one of the 125 Transformational Women of NC State in 2013, and in 2019, received the Rodney H. Adams Endowment Management Award from NACUBO. She was also named one of the Top 30 Investors in Next-Generation leading Endowments by Trusted Insight. Libby received her Bachelor of Science degree in Accounting from Auburn University and was an All-American NCAA athlete in Swimming for the Auburn Tigers. She became a Certified Public Accountant in 1992.

### **David Gilmore, Chief Investment Officer, The Harry and Jeanette Weinberg Foundation**

David Gilmore is the Chief Investment Officer of The Harry and Jeanette Weinberg Foundation. The Foundation has \$3.2 billion in assets and will make over \$150 million in grants this year. The portfolio is invested across all asset classes including public equities, hedge funds, private equity, venture capital and real assets. Prior to joining the Foundation, David helped start The Ohio State University investment office in 2009 and served in several senior roles. The investment office was responsible for the investment management of the University's \$3.5 billion long-term investment pool. David was previously a partner at Gerber/Taylor Capital Advisors, Gerber/Taylor is an independent investment advisory firm. During his tenure the firm consulted on over \$20 billion in assets and managed over \$3 billion in discretionary fund of funds mainly focused on hedge funds and private equity investments. David earned his BBA from Baylor University and an MBA with a concentration in Finance from the University of Memphis. David holds the Certified Financial Planner™ professional (CFP®) designation and the Chartered Alternative Investment Analyst (CAIA) designation.

### **Terry Gottberg, Chairman, President, & CEO, Merit Energy Company**

Terry Gottberg, 55, is the Chairman, President, and CEO of Merit Energy Company. He has over 30 years of experience in the oil and gas industry and has spent 28 of them at Merit. In 2021, Terry was named "Top Midsize Leader" in the Dallas Fort Worth area, along with Merit Energy being named in the "Top 100 Places to Work" for the 10<sup>th</sup> consecutive year. Since joining in 1994, he has had a meaningful impact throughout all areas of Merit. His engineering background and strong leadership qualities have helped maintain our operational focus, as well as our unique culture. Terry has been instrumental in building relationships with our Limited Partners, bankers, and industry leaders. Currently the leaders of our three operating divisions, Acquisitions, Human Relations, General Counsel, Investor Relations, and our CFO report directly to Terry. His previous positions at Merit include, Acquisition and Region Manager, Vice President of Corporate Development, CFO and Senior Vice President. Prior to joining Merit, Terry held several engineering positions for Conoco Inc. Terry received a B.S. in Mechanical Engineering from the University of Wyoming in 1991. He and his wife, Missy Gottberg, have two grown daughters, Kerry and Amy.

### **George J. Hauptfuhrer, CFA, Consultant, Prime Buchholz**

George J. Hauptfuhrer is a Consultant at Prime Buchholz. He joined Prime Buchholz in 2006. George has more than 41 years of investment experience, including research analysis, portfolio management, and consulting. He serves primarily institutional clients in their asset allocation, manager selection, and performance monitoring; assists in manager research and new-business efforts and is a

member of the firm's flexible capital asset class committee. Previous experience: Global partner at Invesco. George has his M.B.A. from UNC-Chapel Hill, where he was a Morehead Fellow, and B.A. from Yale. In addition, he is a member of the CFA Institute/CFA Society of Atlanta; member of the board of the Princess Grace Foundation (USA) and the board of pensions of the Presbyterian Church (USA). George previously served on the boards of Columbia Theological Seminary, the Johnson C. Smith Theological Seminary, The Presbyterian Foundation, Piedmont Healthcare Foundation, and Piedmont Healthcare's Investment Committee; also served on the boards at Rabun Gap – Nacoochee School, New Covenant Trust Company, The Alliance for Christian Media, and the Atlanta Ballet.

#### **Ray Jacobson, Chief Investment Officer, Davidson College**

Ray Jacobson has been the Chief Investment Officer at Davidson College since 2008. He leads a small, experienced team that oversees all aspects of investing the college's endowment. The portfolio has a significant allocation to alternatives, especially hedge funds and venture capital. Davidson's endowment has consistently achieved strong absolute, relative, and risk-adjusted returns. Prior to Davidson, Mr. Jacobson served for four years as the first investment officer for the Golden LEAF Foundation, a nonprofit established to increase economic opportunities in North Carolina. He began his endowment career in 2001 at DUMAC, the investment office for Duke University. Earlier in his career, he worked at Bloomberg Financial Markets and Brown Advisory. He received an M.B.A. from Duke University, an M.S. from Clemson University, and a B.A. from Rutgers University. Mr. Jacobson has been a CFA Charterholder since 2001. He serves on the Board of Woodlawn School. Ray lives in the town of Davidson with his wife and they have four children.

#### **David Jeffrey, Partner, Head of Europe, StepStone Group**

Mr. Jeffrey leads StepStone's activities in Europe and is a member of the private equity team, focusing on Europe, the Middle East and co-investments. He is also involved in the Firm's responsible investing initiative, as well as various investment and management activities. Prior to joining StepStone in 2012, Mr. Jeffrey was a managing partner at Parish Capital where he founded the firm's European and Asian practices and oversaw the secondary and co-investment businesses. Before that, he served as managing director of Bank of America's European private equity group. Previously, Mr. Jeffrey was a managing director and head of BancBoston Capital's European and Asian operations. Mr. Jeffrey received an MA from Cambridge University and is a qualified chartered accountant.

#### **Beth Johnson, Partner, Not-for-Profit Investment Practice, Mercer Investment Consulting**

Beth is a Senior Investment Consultant at Pavilion, a Mercer Practice. She currently services 6 endowment, foundation and family office clients with over \$9 billion in aggregate assets under advisement. For these clients, Beth focuses on projects relating to asset allocation, investment manager selection, performance evaluation, and fund operations and governance. Beth's prior professional experience includes work as an Investment Director for Vanderbilt University's endowment, where she was responsible for investments across traditional equities and bonds, marketable alternatives, oil and gas and private equity. She started her investment career as an Investment Analyst at Duke Management Company, managing investment projects across all asset classes for Duke University's endowment office. Beth attended the University of North Carolina – Chapel Hill Graduate School where she completed coursework in Economics. She holds a BA in Economics, Mathematics, Computer Science, and German from Transylvania University in Lexington, Kentucky. Beth has also earned the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analyst (CAIA) designations. She is a member of the CFA Institute and a past board member of the CFA Society of St. Louis and the Nashville Society of Financial Analysts. Throughout her career, Beth has remained active in her community, sitting on several not-for-profit boards of directors, previously serving as the Investment Committee Chair and then Chair of the Board for the Missouri Foundation for Health, a \$1 billion healthcare foundation in St. Louis. In 2008, she received the Foundation and Endowment Money Management's Non-Profit Consultant of the Year Award.

#### **Christine Kelleher, Chief of Investments, National Gallery of Art**

Christine Zapotoczky Kelleher is chief of investments at the National Gallery of Art, responsible for managing the Gallery's \$1.3 billion endowment. Previously, Christine served as senior investment officer for Georgetown University. She assisted with the founding of Georgetown's Investment Office in 2004 and served as acting chief investment officer in 2011. After Georgetown, Christine led investment strategy, sourcing, and evaluation for Avec Capital, a boutique investment advisory and placement firm. Earlier in her career, she served on the executive team of the Central European University, founded by George Soros, in Budapest, Hungary. Christine is a member of the Board of Investment Trustees for the Montgomery County Employee Retirement Plans and the Board of Trustees for the Consolidated Retiree Health Benefits Trust, the finance committee of the YWCA National Capital Area, the editorial board for The Academy for Institutional Investors, and the CAIA Allocator Council. She serves as a mentor for Accel CIO, accelerating tomorrow's Black & Latino chief investment officers; an advisor to the Kayo Conference Series supporting women investors; and president of the Bucknell University Alumni Association. She received a BA in Russian and international relations from Bucknell

University and holds MAs in Russian and East European studies and in Central European history from Georgetown University. She lives in Washington, DC with her husband and son.

#### **Ken Lee, Chief Investment Officer, Children's Health**

Ken Lee serves as Chief Investment Officer for Children's Health. In this role, Ken is responsible for overseeing the system's investable assets, including those of Children's Medical Center Foundation. Prior to joining Children's Health in 2020, Ken held a leadership role in investments at Carnegie Corporation of New York where he oversaw a range of investments in the public and private markets. Ken graduated from Yale College where he earned a Bachelor of Arts in economics and East Asian studies. Ken earned his Master of Business Administration from the Wharton School at the University of Pennsylvania.

#### **Muthu Muthiah, Chief Investment Officer, Children's Healthcare of Atlanta (CHOA)**

Muthu is the Chief Investment Officer at Children's Healthcare of Atlanta, stewarding the institution's assets to create returns that advance the CHOA mission. Previously, he oversaw the strategic and sustainable growth of Group Health Foundation's investments. Muthu is a seasoned asset management professional, with experience investing globally across various asset classes, including private equity, venture capital, real estate, real assets, and both public and private investments in emerging economies. He has led investment teams and strategies at Emory Investment Management, Covariance Capital Management, the University of Richmond, the State Board of Administration of Florida, and RSM Equico. Outside of work, Muthu reads a lot of nonfiction books, stays active by bicycling or jogging, and enjoys watching Tamil movies. He also likes to travel, including visiting his family and community in India. Muthu holds a BHM from Mangalore University and an MBA from Rollins College.

#### **Brian Neale, Chief Investment Officer, University of Nebraska Foundation**

Brian is responsible for the oversight and investment the University of Nebraska Foundation's assets. His principal duties include establishing long-term asset allocation policies and short-term tactical tilts; investment manager research and selection; portfolio compliance and oversight; and serving as principal staff liaison to the board of directors and its investment committee. He joined the foundation in 2014 and has more than 20 years of professional financial and institutional investment experience.

#### **Marko Papic, Partner & Chief Strategist, Clocktower Group**

Marko is a Partner and Chief Strategist at Clocktower Group, an alternative investment asset management firm based in Santa Monica, California. He leads the firm's Strategy Team, providing bespoke research to clients and partners on geopolitics, macroeconomics, and markets. Prior to joining the firm, Marko founded BCA Research's Geopolitical Strategy practice (GPS) in 2012, the financial industry's first dedicated political analysis investment strategy. The GPS service generated geopolitical alpha by identifying gaps between the market's political expectations and the firm's forecasts. Marko was a Senior Vice President and the firm's Chief Geopolitical Strategist. Marko began his career as a Senior Analyst at Stratfor, a global intelligence agency where he contributed to the firm's global geopolitical strategy as well as its analyst recruitment and training program. In his academic work, he helped create the Center for European Union Studies at the University of Texas at Austin. Marko holds an MA in Political Science from the University of Texas at Austin and an MA from the University of British Columbia. He is the author of Geopolitical Alpha: An Investment Framework for Predicting the Future, a book that introduces his constraints-based framework to investors. Born in Belgrade, Serbia, he has lived in Iraq, Jordan, Switzerland, Canada, and the U.S.

#### **Ben Pierson, President & Chief Investment Officer, Sherwood Family Office**

Ben Pierson is President and Chief Investment officer for a first generation single-family-office. He is responsible all aspects of the investment portfolio and operations. Prior to joining the Sherwood family, he worked in the Alternative Investment Division ("AID") of Wafra, Inc, a \$25+ billion-dollar sovereign wealth fund. While at Wafra, Mr. Pierson sat on AID's Investment Committee and helped manage all asset classes including hedge funds, public equity, private equity, venture capital, real estate, real assets, secondary markets, strategic partnerships, and alternative finance. Prior to Wafra, Mr. Pierson spent over ten years as an investment professional at fund of hedge funds Achstone Partners and Cross Shore Capital. Mr. Pierson earned his B.A. from Hamilton College and his M.B.A. from Cornell Johnson Graduate School of Management.

#### **John Pinkel, Portfolio Manager & Partner, Indus Capital**

John D. Pinkel is a Partner of Indus Capital, based in San Francisco. Mr. Pinkel is the portfolio manager of the Indus Select Fund. Mr. Pinkel joined Indus Capital in March 2003 from Citigroup where he was Managing Director and Head of Equities in the Taipei branch. Prior to joining Citigroup, Mr. Pinkel spent eight years as a securities analyst in Hong Kong, China and South Korea. Mr. Pinkel lived

and worked in Asia for 24 years. Mr. Pinkel, a CFA charterholder, graduated from the University of California, Santa Barbara, with a BS in Applied Mathematics. He spent the academic year of 1990-1991 at the Stanford Center in Taipei (Inter-University Program for Chinese Language Studies). Mr. Pinkel is fluent in Mandarin Chinese.

**Caroline M. Poland, MA, LMHC, LCAC, CCTP, CCFP, NCC, Founder and CEO**

**Poland and Associates Consulting, LLC**

Caroline M. Poland is the Founder and CEO of Poland and Associates Consulting. She is a Licensed Mental Health Counselor, a Licensed Clinical Addictions Counselor, a Certified Clinical Trauma Professional, a Certified Compassion Fatigue Professional, and a Nationally Certified Counselor. She is also certified in EMDR therapy, a form of therapy designed for those who experience distress around traumatic memories and Post Traumatic Stress Disorder. She is the Founder and Owner of Landmark Counseling, a private practice that serves clients in the state of Indiana. Ms. Poland is the creator of the Preferred Cognitive Styles and Decision Making Model, which was first discussed in a 2011 article published in *Vaccine*. This model outlines a series of cognitive styles that individuals employ in decision making, and outlines communication strategies that the health care provider can use to communicate effectively with that patient to create behavior change – in particular in regards to vaccine acceptance. She has also published on the use of the Empathy tool in improving immunization rates, and the role of distortions of human behavior in pandemic planning. Ms. Poland is the former Director of the Counseling Center at Taylor University, where she served for 10 years and held academic rank. In addition to her duties in the Counseling Center, she designed and taught an innovative psychology class. She is a member of the Board of Advisors for the Vaccine Education Project, and was an invited participant for forums on vaccine hesitancy and acceptance through the American Academy of Arts and Sciences. Ms. Poland has presented over 170 invited seminars and talks nationally and internationally including invited talks at the United States Air Force Academy, Duke University, Mayo Clinic, Universidad Del Azuay in Cuenca, Ecuador, the University of Athens Children’s Hospital in Athens, Greece, the National Foundation for Infectious Diseases Annual Conference on Vaccine Research, the Annual Vaccine Congress, and the 4<sup>th</sup> Influenza Vaccines for the World Congress in Spain. Ms. Poland has published over 15 scientific papers and book chapters incorporating psychological and cognitive models into health decision making, specifically looking at vaccine hesitancy and acceptance. Ms. Poland is a popular and energetic consultant and conference and seminar speaker, bringing insights from psychology, mental health, and science on every day problems faced in healthcare, business, and leadership settings. She has given many popular and acclaimed seminars and talks on the topics of women in the workplace, vaccine hesitancy, compassion fatigue and burnout, trauma, establishing trauma informed care in educational, hospital, and clinical settings, sexual assault, emotional regulation, and improving overall health and wellness for flourishing. Ms. Poland has worked with organizations around the world on issues of healthy workplaces, impactful leadership, and women in the workplace. Finally, Ms. Poland is frequently sought out by radio, television, and print media for her views on the above topics.

**Dr. Gregory Poland, M.D., Director Vaccine Research Group, Mayo Clinic, Mary Lowell Leary Emeritus Professor of Medicine, Distinguished Investigator of the Mayo Clinic; Editor-in-Chief for the journal *VACCINE***

Gregory A. Poland, M.D., is a physician-scientist and the founding and current director of Mayo Clinic’s Vaccine Research Group — a state-of-the-art research group and laboratory that seeks to understand genetic drivers of viral vaccine response and application of systems biology approaches to the generation of immunity, as well as the development of novel vaccines against emerging pathogens important to public health. The Poland lab developed the field of viral vaccine immunogenetics, the immune response network theory, and the field of vaccinomics and adversomics. He has been awarded over \$220 million in competitive extramural research funding. Dr. Poland holds the academic rank of professor of medicine and infectious diseases and molecular pharmacology and experimental therapeutics. He is the Distinguished Investigator of the Mayo Clinic, and is the Editor-in-Chief for the journal *Vaccine*. In 2018 Dr. Poland was elected a Fellow of the Royal College of Medicine in London, England. Dr. Poland has chaired or been a member of every Federal committee involved in vaccine decision-making, including the NVAC, VRBAC, and the ACIP. Dr. Poland advocated for and successfully persuaded the CDC to recommend annual influenza vaccine for all Americans age 6 months and older, and was the initial and primary advocate for requiring influenza immunization for all health care providers. Dr. Poland was the 2013 recipient of the Mayo Distinguished Investigator award by the Mayo Board of Trustees, and the 2012 recipient of the Mayo Clinic Department of Medicine Lifetime Research Achievement Award. In 2012, Dr. Poland was named in the top 25 list of vaccine influencers in the world. In February 2013, he was nominated for membership in the Institute of Medicine (IOM). In addition, he recently received an NIH MERIT Award, an honor accorded to less than 5% of the nation’s top NIH-funded investigators. Dr. Poland was awarded the Secretary of Defense Award for Excellence in December 2008. In 2008, he was named a Master of the American College of Physicians. Dr. Poland received the Hsu prize in International Infectious Disease Epidemiology in 2007, and the Charles Merieux Lifetime Achievement Award in Vaccinology in May 2006. In December 2006, In December 2006, Dr. Poland was

elected President of the Defense Health Board and appointed by President George W. Bush, serving two terms. In 2005 he was awarded an honorary Doctor of Humane Letters by Illinois Wesleyan University, his alma mater. He was appointed as the Mary Lowell Leary Professor in Medicine (the highest academic distinction for a faculty member) by Mayo Clinic's Board of Trustees in 2004. In May 2003, he was awarded the Secretary of Defense Medal for Outstanding Public Service. – the highest civilian award given by the Department of Defense. He is the immediate past president of the Department of Defense's Defense Health Board and the Armed Forces Epidemiological Board. Dr. Poland served on the Infectious Diseases Society of America Taskforce on Pandemic Influenza, and chaired the American College of Physician's Adult Immunization Advisory Board. Dr. Poland received the inaugural Gold Medal from the Spanish Vaccinology Society in 2001. Dr. Poland received his medical degree from the Southern Illinois University School of Medicine in Springfield, Illinois, and completed his residency and advanced post-graduate work at the University of Minnesota. He has published over 700 professional papers and book chapters. Dr. Poland is regularly sought out by specialized and lay print, TV, and radio (national and international) media for his clarity and views on science, leadership, and theological aspects of current issues in the culture. He has been awarded multiple "Teacher of the Year" awards across his 40 year medical and scientific career. Dr. Poland regularly provides high-level advice to pharma, business, NGOs, and governmental agencies on emerging infectious disease and vaccine issues. Dr. Poland is a popular conference and seminar speaker on the topics of vaccines, scientific issues, and emerging infectious diseases. Dr. Poland has given over 4,000 national and international media interviews and professional presentations on the COVID-19 pandemic and vaccines.

### **Stephanie Pomboy, Founder & President, MacroMavens**

Stephanie Pomboy is founder and president of [MacroMavens](#), a boutique research firm that provides macroeconomic research and consulting services to the investment community. Started in 2002, the firm has earned a reputation for calling major macro developments *well ahead of the curve*, including the housing bust, the financial crisis that followed and the 2018 market meltdown. If reluctantly, Stephanie has submitted to interviews with key industry publications, such as *Barron's* and *The Walling Letter*, as well as Real Vision and Wealthion, among others. She is also a regular guest on Fox Business and Bloomberg TV. Prior to launching [MacroMavens](#), Stephanie worked with Ed Hyman at CJ Lawrence and, then, at Evercore ISI. She earned a BA in Economics from Dartmouth College. And now resides in Florida with her English bulldog.

### **Dr. Terry L. Root, Senior Fellow (University Faculty) Emerita, Woods Institute for the Environment at Stanford University**

Terry L. Root is Senior Fellow (University Faculty) Emerita in Stanford's Woods Institute for the Environment at Stanford University. Her research addresses how plants and animals are changing with the changing climate, including extinction risk of species. She was a lead author of the Intergovernmental Panel for Climate Change 4th Assessment Report that in 2007 was co-awarded the Nobel Peace Prize with Vice President Al Gore. Also, she was a lead author for the 3rd Assessment Report (2001) and a Review Editor for the 5th Assessment Report (2014). In addition to other honors, Root was awarded the Spirit of Defenders Award for Science by Defenders of Wildlife in 2010, and Lifetime Achievement Award in 2016 from the conservation organization Point Blue. She has served on the boards and as science advisor to several non-governmental organizations, including the National Audubon Board from 2010 through 2019. Currently, she is on the board of Defenders of Wildlife, Renewable Energy Wildlife Institute, and Birds Caribbean. Root earned her undergraduate degree in Mathematics and Statistics from the University of New Mexico, her master's degree in Biology from the University of Colorado and her doctorate in Biology from Princeton University. She was a Professor at the University of Michigan for 15 years, when she moved to Stanford University where she was on the faculty for another 15 years. She now lives in Santa Fe, New Mexico. When not giving talks and continuing scientific research on species and climate change, she is actively pursuing her hobbies of throwing pottery on the wheel, bird watching, and hiking.

### **Joe Schorge, Managing Partner, Isomer Capital**

Joe has 25 years' experience working as an LP, GP and technology operations executive. Prior to Isomer he was MD for Business Development at Pomona Capital, a leading global secondaries firm, and earlier at Cambridge Associates responsible for advising institutional investors on venture capital and private equity investments. Joe began his career in information technology operating roles, most notably at Invensys plc (now Schneider Electric) in the US and Europe. He received a BS Electrical and Computer Engineering from the University of Massachusetts, Dartmouth and an MBA from London Business School.

### **Erik Sebusch, Partner, Global Strategy Leader Venture Capital & Growth Equity, Mercer Investment Consulting**

Erik Sebusch is a Partner at Mercer Alternatives boutique, specifically focused on Private Equity. He is the Global Strategy Leader of Venture Capital and Growth Equity. In addition to fund research, Erik is involved in co investments and secondary opportunities. Before Mercer, Erik was a Partner with a San Francisco-based Venture Capital / Growth Equity manager Presidio Partners FKA CMEA Capital. His primary duties were managing the corporate strategic investors, traditional institutional limited partners and early-stage technology investing. In addition, Erik served on the boards of multiple technology companies, led technology investments and served on the Investment Committee while at CMEA. Prior to CMEA, Erik spent nearly 12 years at UPS. Erik began in New Product Development, and Innovation then moved to the Corporate Venture Capital group and lastly worked as a Private Markets Portfolio Manager to over a \$5 billion allocation to private assets in the \$30+ billion UPS Pension. Before UPS, he spent ten years working as a high-net-worth financial consultant for Merrill Lynch and private practice for individuals and family offices. Erik holds an International MBA from Thunderbird, School of Global Management and serves on over 20 limited partner advisory boards.

### **Adela Skenderasi, Partner & Portfolio Manager, Brown Advisory**

Adela Skenderasi is a partner and portfolio manager at Brown Advisory. She is responsible for managing the investment portfolios of endowment and foundation institutional clients and also providing specific guidance on their long-term investment objectives. Prior to joining the firm, Adela worked for 8 years as a Senior Investment Officer at the International Monetary Fund (IMF), where she oversaw all aspects of portfolio management for the defined benefit plan and healthcare benefit assets of the institution. In 2018, Adela took a sabbatical from the IMF to join the Bank for International Settlements (BIS) in Switzerland, where in addition to overseeing the externally managed funds of the defined benefit plan, she contributed to the alternative investments review and co-authored research papers on sustainable investing and climate change impact on public investors' portfolios. Prior to joining the IMF, she was Director of Investment Operations for Georgetown University's Investment Office. Adela holds an MBA with a focus in Finance from Virginia Polytechnic Institute and State University and has been a CFA charterholder since September 2011.

### **Donna L. Snider, Chief Investment Officer, Hackensack Meridian Health**

Ms. Snider joined Hackensack Meridian Health in 2020 as their first CIO with the mandate to build an investment office that will support the organization's mission of transforming healthcare and being viewed as a leader of positive change. The HMH investment office manages both the endowment and pension assets for the hospital system. Prior to joining HMH, Donna was a Managing Director at The Kresge Foundation since 2009 where she had responsibility for evaluating investment opportunities across all asset classes as well as oversight for the internal trading activity. Prior to joining Kresge, Donna was a director in the Global Markets and Investment Banking division of Merrill Lynch in New York where she covered institutional investors for structured credit, rates and equity products, as well as corporate issuers for their balance sheet hedging activity. Prior to Wall Street, Donna was a pension actuary with Towers Perrin (now Willis Towers Watson) in Chicago. Donna earned her MBA with concentrations in accounting and analytical finance from the University of Chicago Booth School of Business; she holds a Bachelor of Science in Mathematics from the University of Notre Dame, Magna Cum Laude, Phi Beta Kappa; professional designations include CFA charter holder and an Associate of the Society of Actuaries.

### **Kyle Stewart, Investment Director, Children's Health**

Kyle Stewart is an Investment Director at Children's Health System of Texas, a 2.0-billion-dollar Dallas based Foundation. At Children's, Mr. Stewart oversees the Foundation's Hedge Fund, Private Credit and Liquid Real Asset allocations and serves on the internal investment committee. Prior to joining Children's, Mr. Stewart was a Sr. Investment Analyst / Co-Portfolio Manager at Irvington Capital as well as a Research Associate at Taylor Investment Advisors. Mr. Stewart holds a B.B.A. from Texas Tech University and a M.S. in Finance from Southern Methodist University.

### **Emily Sumner, Chief Investment Officer, Investment Committee Chair, Gilder Office for Growth**

Emily serves as the Chief Investment Officer and chair of the investment committee at the firm. In her role, Emily provides oversight and guidance in managing and coordinating all aspects of investment activities and strategies consistent with its mission, objectives, and established policies. Prior to joining the firm, Emily was an Investment Officer at Oklahoma State University and a Vice President within the Investment Management Group at Hatteras Funds where she focused on sourcing, due diligence, and portfolio management of alternative investments strategies across public and private asset classes. Emily received her Bachelor of Arts degree from Randolph Macon College with majors in both Business/Economics and Accounting. Emily also obtained her Master of Business Administration degree with a concentration in finance from the University of North Carolina, Kenan-Flagler Business School. Emily is a CFA® charterholder and a Chartered Alternative Investment Analyst.

### **Peter Troob, Co-Head, TF Investments**

Peter Troob co-heads TF Investments, a single-family office with his brother, Doug Troob. In this role, he is responsible for investing the capital of his family office across asset classes including private equity and debt, real estate, venture capital and special situations. They also co-founded Troob Capital Management LLC in 2002. Peter leads TCM's opportunistic investment strategy providing capital solutions across asset classes, capital structures, industries and geographies in both liquid and illiquid investments. His responsibilities include identifying, evaluating, structuring, and managing investments as well as portfolios. Mr. Troob has extensive experience investing in growth opportunities as well as deep value, distressed, restructurings, and illiquid situations. Prior to founding TCM, Mr. Troob was a Principal at Everest Capital, a global hedge fund, where he was focused on the Everest Capital Senior Debt L.P. and concentrated on distressed securities, capital structure arbitrage and special situations. Prior to joining Everest, Mr. Troob was a Partner at Contrarian Capital Management LLC, a distressed debt and special situation hedge fund, where he was responsible for all aspects of the investment process with active involvement in driving value-creating events. He also worked in the investment banking departments of Donaldson, Lufkin & Jenrette, Kidder Peabody and The Geneva Companies engaging in mergers and acquisitions and corporate finance transactions. Mr. Troob is a published author of *Monkey Business: Swinging Through the Wall Street Jungle*. He received a B.A. and graduated magna cum laude and Phi Beta Kappa from Duke University in 1991, and an M.B.A. from Harvard Business School in 1995.

### **Boaz Weinstein, Founder & Chief Investment Officer, Saba Capital Management**

Boaz Weinstein is the founder and Chief Investment Officer of Saba. Mr. Weinstein founded Saba in 2009 as a lift-out of Saba Principal Strategies. At Saba, Mr. Weinstein leads a team of professionals, with the senior investment team having worked together for seventeen years. Prior to founding Saba, Boaz Weinstein was Co-Head of Global Credit Trading at Deutsche Bank. In that role he was responsible for overseeing a group of approximately 650 professionals and was a member of the Global Markets Executive Committee. Throughout his career at Deutsche Bank, Mr. Weinstein had dual responsibility for proprietary trading and market making. In proprietary trading, he founded Saba Principal Strategies to specialize in credit and capital structure investing. As a market-maker, he focused on credit default swaps, investment grade bonds, and high yield bonds. Mr. Weinstein worked at Deutsche Bank for eleven years, the last eight as Managing Director, a title he received at age 27. Mr. Weinstein graduated from the University of Michigan, Ann Arbor, with a BA in Philosophy. Boaz Weinstein grew up in New York City and attended Stuyvesant High School. Mr. Weinstein is a Leadership Council member for Robin Hood, New York's largest poverty-fighting organization.

### **John Wolff, CIO of Insight Partners Public Equities**

John Wolff is a Managing Director at Insight Partners and the Chief Investment Officer of Insight Partners Private Equities ("IPPE"). Prior to Insight, John was the Founder and CIO of C243 Capital Management and from 2015 to 2020, John was the Head of Technology Investing and a Portfolio Manager at Omega Advisors. Before joining Omega, John was a Principal at Andor Capital from 2012 to 2015. John also spent five months at Eastbay Capital during Omega's transition to a Family Office in late 2018. John started his career in finance at Goldman Sachs in its TMT Investment Banking Division after successfully exiting the internet startup he co-founded. John also served as a director for Slader LLC., a leading education platform for high school and college students, and advised the company through their acquisition by Quizlet in 2020. John graduated from Harvard College with a degree in Psychology. During his junior year, he was drafted by the Chicago White Sox and played two years of minor league baseball in the Chicago White Sox and New York Mets organizations. After retiring from baseball, John received his MBA from Columbia Business School.

### **Mark W. Yusko, CEO & Chief Investment Officer, Morgan Creek, Managing Partner, Morgan Creek Digital**

Mark Yusko is the Founder, CEO and Chief Investment Officer of Morgan Creek Capital Management. He is also the Managing Partner of Morgan Creek Digital. Morgan Creek Capital Management was founded in 2004 and currently manages close to \$2 billion in discretionary and non-discretionary assets. Prior to founding Morgan Creek, Mr. Yusko was CIO and Founder of UNC Management Company (UNCMC), the Endowment investment office for the University of North Carolina at Chapel Hill. Before that, he was Senior Investment Director for the University of Notre Dame Investment Office. Mr. Yusko has been at the forefront of institutional investing throughout his career. An early investor in alternative asset classes at Notre Dame, he brought the Endowment Model of investing to UNC, which contributed to significant performance gains for the Endowment. The Endowment Model is the cornerstone philosophy of Morgan Creek, as is the mandate to Invest in Innovation. Mr. Yusko is again at the forefront of institutional investing through Morgan Creek Digital Assets, which was formed in 2018. Morgan Creek Digital is an early stage investor in blockchain technology, digital currency and digital assets. Mr. Yusko received a BA with Honors from the University of Notre Dame and an MBA in Accounting and Finance from the University of Chicago.





## Join the Academy for Institutional Investors Community!

The Academy Community is comprised of CIOs, CEOs, CFOs, Presidents, Portfolio Managers, Senior Investment Directors, Managing Directors, Principals, Senior Investment Associates, and other Financial Professionals. When you Register for an Academy Forum, you will automatically become a member of our Institutional LP/GP Community (*membership dues are automatically built into the registration fee per event*). By registering for the Spring Forum 2023, you will be given priority registration access to the Fall Forum 2023 should your schedule allow you to attend and you register before the deadline.

Join a group of senior level decision makers in a collegial, comfortable, friendly, fun, non-sales type of atmosphere where allocators and managers come together face-to-face to share common challenges and exchange investment ideas. The Academy has fostered an environment to learn and connect with one another in a way that promotes lifelong relationships, trust and friendships. The Academy strives to have at least 50% of the attendees represented by the allocator LP community with a limited number of managers and service providers who also can participate. Attendance is limited to no more than 250 people per event.

All Academy gatherings and forums are completely **off-the-record** (*no press allowed*) with a **no-marketing policy**. We encourage members **not to solicit** others during the conference programming. Exchanging business cards is entirely appropriate. Time is dedicated during the opening evening of each forum to bring everyone together for a down-to-earth, networking dinner where members can bond and get to know one another on a more human level.

### Asset Owners/Allocators

(*Investment Research Professionals*)

Endowments  
Foundations  
Pension Funds  
Healthcare/Hospitals  
Single Family Offices (SFOs)  
Multi Family Offices (MFOs)  
Sovereign Wealth/Insurance Firms  
Outsourced CIOs  
Investment Consultants

### Managers/Asset Management

Hedge Funds  
Private Equity Funds  
Venture Capital Funds  
Real Estate Funds  
Real Assets Funds  
Fixed Income/Traditional Funds  
Asset Management Firms  
Fund-of-Funds  
Emerging Managers  
Alternative Investment Funds

### Limited # of Service Providers

Cap-Intro Groups  
Third Party Marketing Firms  
Placement Agents  
Accounting Firms/Law Firms  
Technology Solutions  
Other Service Providers

## CPE Credits Available at our Forums!



Academy for Institutional Investors is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).



[UPCOMING AII PROGRAMS 2023!](#)

*"Invitation-Only"*

**Allocator Investment Huddle**

**March 1-2, 2023**

**The Sanctuary at Kiawah Island Golf Resort, South Carolina**

*Dinner on Mar. 1<sup>st</sup> & Full Day Huddle on Mar. 2<sup>nd</sup>*

*Limited to 20-25 Allocators and 5 Managers*

**Spring Investment Academy Forum**

**May 22-23, 2023**

**The St. Regis Hotel, Atlanta, Georgia**

*Limited to 250 Attendees (LP/GP 50/50 Ratio)*

**Fall Investment Academy Forum**

**October 25-26, 2023**

**The Carolina Inn, Chapel Hill, North Carolina**

*Limited to 250 Attendees (LP/GP 50/50 Ratio)*

*"Invitation-Only"*

**Allocator Investment Huddle**

**December 4-5, 2023**

**Barings Global Headquarters, Charlotte, North Carolina**

*Dinner on Dec. 4<sup>th</sup> & Full Day Huddle on Dec. 5<sup>th</sup>*

*Limited to 20-25 Allocators and 5 Managers*