



FW: Atlanta Meeting <Watchdog: Virus checked>

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10/02/2014 10:34 AM

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1 Attachment



2nd Annual Southeast Institutional Investor Forum.pdf

Hello,

I hope you are well.

My name is Peter Walder, and I tried to call you earlier but was unable to reach you.

I would like to discuss my firm, US Markets **upcoming 2nd Annual Southeast Institutional Investor Forum** taking place at the Marriot Buckhead in **Atlanta, Georgia on November 4th 2014**. I'd like to extend an invitation for you to join as a guest at the event.

It's a nice opportunity for the local investor community to meet and discuss investment strategy, fiduciary responsibility and corporate governance; ***we also offer continuing CPE and CFP credits***. I have attached a working agenda for the event.

Past Advisory Board Members & Contributors Include:

Jim Potvin, Executive Director, **Employees' Retirement System of Georgia**

Hershel Harper, Jr., Chief Investment Officer, **South Carolina Retirement System**

Brad Gates, Senior Investment Officer, **Southern Company Pension Plan**

Mary Law, Senior Portfolio Manager, **Wake Forest University**

Kenneth A. Souza, Investment Director, **University of South Florida Foundation**

Rep. J. Kevin Pearson, Chairman of the House Retirement Committee, **State of Louisiana**

William F. Kelley, Employees' & Judicial Retirement Executive, **Retirement Systems of Alabama**

This is an ***invite only*** no fee event designed for the staff and trustees of Public/Corporate Pension Funds, Foundations, Taft Hartley Plans & Investment Advisors; it is closed to the press and to registrations from vendors.

Please let me know if you or other members of your team will be able to attend, I will follow up later to provide an update on the program and confirm your place.

Best Regards,

Peter Walder
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Join us on LinkedIn: <http://www.linkedin.com/company/us-markets---center-for-institutional-investor-education>

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2nd Annual Southeast Institutional Investor Forum

*A Meeting of Regional Institutional Investors-November 4th, 2014
Marriot Buckhead
3405 Lenox Rd NE, Atlanta, GA 30326*

DESIGNED FOR:

*Public Pension Funds, Corporate Pension Funds, Foundations, Endowments, Taft Hartley Plans, and
Investment Advisors*

2014 Program Contributors

Jim Potvin, Executive Director, **Employees' Retirement System of Georgia**
Greta Tinaglia, Executive Director, **Fulton County Schools Employees' Pension Board**
Brad Gates, Senior Investment Officer, **Southern Company Pension Plan**
Bill Rodenbeck, Investment Manager, **Gwinnett County Public Employees Retirement System, GA**
Diya Luke, Southeast Investment Leader, **Towers Watson**
Jerry Davis, Chairman, Eighth District Retiree Council, **US Coast Guard**
James Meynard, President, **Georgia Association of Public Pension Trustees**
Erik Sebusch, Principal of the Private Equity Research Group, **Mercer**
Troy Johnson, Chief Financial Officer, **Southern Education Foundation**
Dana Brown, Consultant, **Callan Associates**
Matthew Bauder, Senior Vice President, **Atlanta Consulting Group**

2013 Program Contributors

Rep. J. Kevin Pearson, Chairman of the House Retirement Committee, **State of Louisiana**
Jay Chaudhuri, General Counsel & Senior Policy Advisor, **North Carolina Department of State Treasurer**
Kenneth Souza, Investment Director, **University of South Florida Foundation**
Larry Mahle, Trustee, **Atlanta Fire Pension Fund**
Mark Eisner, Chairman, **Daytona Beach Police and Firefighters' Pension Fund**

EDUCATIONAL PARTNERS

CFP Board
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CONTRIBUTING PARTNERS

WisdomTree
Voya Investment Management
Performance Equity
Bernstein Litowitz Berger & Grossmann LLP
Brandes Investment Partners
Siguler Guff & Company, LP
State Street Global Advisors
R2 Macro

730 Registration & Welcome Coffee

800 Breakfast Workshop: Global Insights: Hosted by Brandes Investment Partners
Jeffrey Germain, Senior Analyst, Brandes Investment Partners

845 Host's Welcome

US Markets team welcomes guests to the Southeast Institutional Investor Forum
Daniela Guerrero, Program Director, US Markets

850 Chairperson's Welcoming Remarks

Darren Massey, Senior Vice President, Institutional Sales, Voya Investment Management

855 Pension Executive Roundtable

Pension fund executives will discuss how in-house investment management provides savings and optimal performance within their fund. Let's explore how pension plans are grabbing the reins and cutting costs for their state funds.

Moderator

Darrell Cobbins, Board Member, The Memphis Light Gas and Water

Panelists

Jim Potvin, Executive Director, Employees' Retirement System of Georgia

Greta Tinaglia, Executive Director, Fulton County Schools Employees' Pension Board

915 Trends and Outlook for the US Economy

As the country looks toward growth and away from the Great Recession, this presentation will examine the overall state of the American economy. What should you expect this year in the housing market? Will employment numbers improve and how will taxes affect investments in the country's future?

Presenter

Matt Toms, Managing Director, Head of Public Fixed Income, Voya Investment Management

950 Smart Beta – Buzzword Explained

The cap-weighted index fund is facing intense competition from "smart beta" alternatives. What is "smart beta" and why is it becoming so popular with investors? Understand the key drivers of return and issues when considering "smart beta" for your portfolios

Panelists

Luciano Siracusano, Chief Investment Strategist, WisdomTree

Kevin Schmid, Consultant, CapTrust Advisors

1025 Panel: Alternative Investments Part 1: Real Assets, Liquid Alternatives, Private Debt, Infrastructure & Hedge Funds

This panel examines some important return enhancers and risk diversifiers. But the upside potential comes with limited liquidity and high fees. What strategies can you get from these investments that meet your objectives?

Moderator

Jerry Davis, Chairman, Eighth District Retiree Council, US Coast Guard

Panelists

Diya Luke, Southeast Investment Leader, Towers Watson

Brad Alford, Chief Investment Officer, Alpha Capital Management

1100 Morning Coffee Break

1115 Private Equity Update

As institutional LPs become more and more experienced and sophisticated, they now have more choices of accessing (and exiting) private equity investments. This panel will provide an update on the latest trends and opportunities.

Panelists

Erik Sebusch, Principal of the Private Equity Research Group, **Mercer**
Speaker, Managing Director, **Performance Equity**

1150 Asset Recovery Update: The Current Landscape of Securities Litigation

In the last two decades, securities litigation has recovered nearly \$90 billion in assets that have been lost to fraud and fiduciary issues – the majority due to the dedicated efforts of the institutional investor community. This presentation will examine the governance and legal issues of which institutional funds need to be aware, and will look at the Supreme Court’s landmark June 2014 decision in *Halliburton II* which preserves investors’ right to rely on the integrity of the securities markets and to hold companies and their executives accountable for violating federal securities laws

Moderator

Larry Mahle, Trustee, **Atlanta Fire Pension Fund**

Panelists

Hannah Ross, Partner, **Bernstein Litowitz Berger & Grossmann LLP**
Mark Lebovitch, Partner, **Bernstein Litowitz Berger & Grossmann LLP**

1225 Luncheon

125 Relative Value in the Credit Markets: Institutional Demand for Credit Strategies

This session will focus on several credit strategies that have evolved over time, including Emerging Market Debt, European High-Yield and Leverage Loans, US Middle Market Debt, Bank Loans, etc. Our panelists will debate the merits and pitfalls when these are incorporated into your portfolio.

Panelists

Sean Greene, Managing Director, **Siguler Guff & Company, LP**
Larry Eckman, Senior Vice President, **Segal Rogerscasey**

150 Protecting Your Portfolio from Market Volatility

Market volatility tends to keep managers up at night, and since the Federal Reserve has embarked on a program of quantitative easing, volatility has diminished in the marketplace. However, as investors begin to react to the Fed’s exit from this program, volatility should return. Thus, we feel it’s an important topic to discuss and panelists will share their views on volatility and strategies to deal with this shift in the markets.

Panelists

Troy Johnson, Chief Financial Officer, **Southern Education Foundation**
Speaker, Managing Director, **State Street Global Advisors**

225 The Changing Landscape of Emerging Markets

Emerging Markets have always been the tempting land of opportunities to investors - the headline growth figures, the amazing stories of wealth building, social changes, infrastructure developments, evolving spending patterns, etc. But how should we go about investing in EM? Which emerging economies today are most attractive to U.S. institutional investors, all things considered?

Panelists

Dana Brown, Consultant, **Callan Associates**

Bill Rodenbeck, Investment Manager, **Gwinnett County Public Employees Retirement Systems, GA**
Speaker, Managing Director, **R2 Macro**

300 Inflation Protection in Institutional Portfolios

Should institutional investors consider inflation protection as a dedicated mandate within their asset mix? What are the best ways to implement an inflation hedge, and what kind of investors would benefit most from such protection?

Panelists

Matthew Bauder, Senior Vice President, **Atlanta Consulting Group**

335 Afternoon Coffee Break

350 Fiduciary Responsibility for Management & Trustees

This session will be a discussion on the importance of the Board in establishing good governance practices. The role of audits as monitoring tools, the importance of establishing the right standards, transparency to stakeholders, lines of authority and reporting, delegation among staff, the investment consultant, investment manager, and the custodial bank are just a few of the key points covered in this session.

Panelists

Lori McKnight, Former Compliance Manager, **Florida State Board of Administration**

Yvonne Yancy, Trustee, **City of Atlanta Police Officers' Pension Fund**

Dwight Mattingly, President, **Amalgamated Transit Union Local 1577**

425 Advanced Asset Allocation

In order to grow the pie, we need to cut it. Some slices will be larger than others but won't necessarily grow faster. There are many ways to view and implement this process. Our expert speakers will compare notes on their approaches.

Moderator:

James Meynard, President, **Georgia Association of Public Pension Trustees**

Panelists:

Travis Newman, Consultant, **DeMarche Associates**

Will Buividas, Treasurer, **Phoenix Law Enforcement Association**

500 Panel: A Conversation with the Region's Leading Investment Officers

Investment officers will focus on the key investment and management issues facing the region's funds.

Panelists:

Brad Gates, Senior Investment Officer, **Southern Company Pension Plan**

535 Chairperson's Closing Remarks

Darren Massey, Senior Vice President, Institutional Sales, Voya Investment Management

540 Southeast Closing Roundtables

Join us for informal gatherings with some of the region's leading investors and thought leaders to continue the conversations of the day.

600 Invitation only dinner hosted by Voya Investment Management