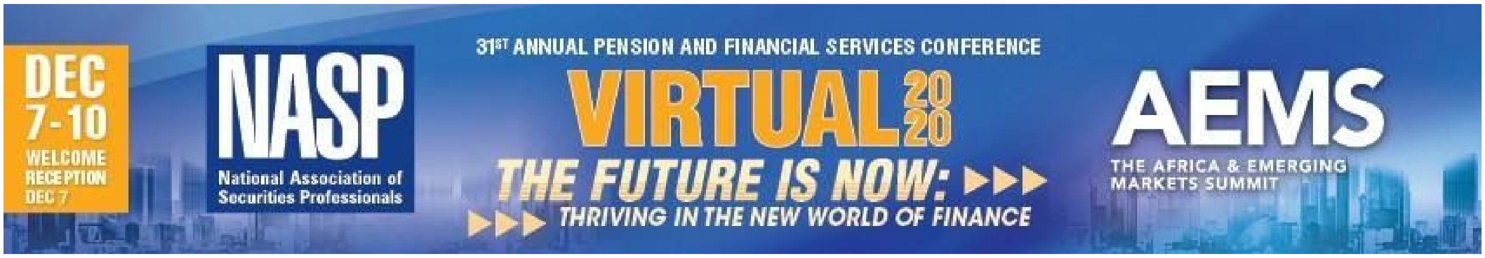


SCHEDULE OF EVENTS

Pre-Conference: Monday, December 7, 2020

THE NASP INSTITUTE (TNI) ****Trustees/Plan Sponsors/Investment Staff/Consultants ONLY (plus African trustees)***

When you complete these sessions, you should be able to:

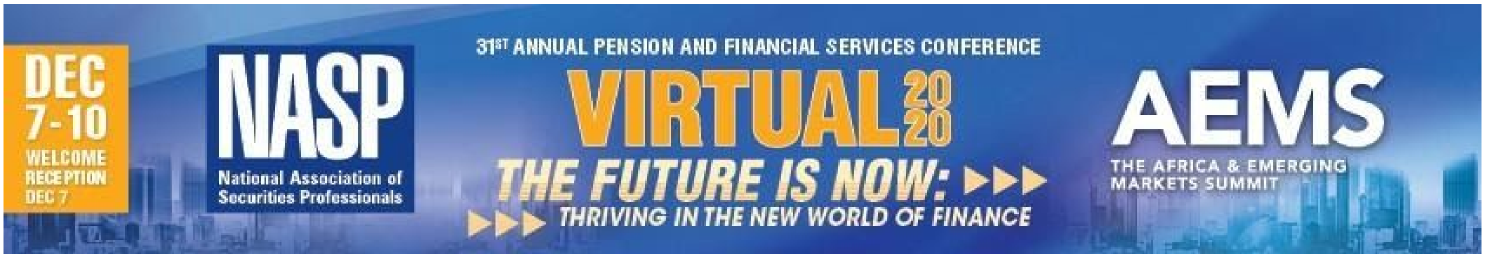
- *Recognize and discuss key tenets of thematic, macro, factors based, and other types of investing*
- *Recognize portfolio strategies from the simple equity income to defensive equity to hedge funds and other more complex options*
- *List at least two differences among benchmarks for varying asset classes and regions and scoring and assessing ESG factors*
- *Identify and discuss various fixed income strategies including the differences between core and non-traditional strategies*

Qualifies for up to 4 CPE credit hours. Field of Study: Finance. No advanced preparation needed. Prerequisite: Must currently serve as Trustees or Staff to an Institutional Fund or Family Office Program. Program levels are intermediate and advanced and is presented Group Internet Based. For questions or additional information regarding refund, complaint, and/or program cancellation policies, please contact Marshay Hall at mhall@nasphq.org.

PFM 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.

9:00 AM - 9:30 AM Central Time

The NASP Institute (TNI) ****Trustees/Plan Sponsors/Investment Staff/Consultants ONLY (plus African trustees)***



Primer for the Day: Gameshow Style
This interactive session will help you prepare for your time with us for the NASP Institute. Get a refresher of the ABCs of asset allocation whether tactical or strategic asset allocation, understand the framework of key concepts to be discussed, and hear about best practices of setting policies, fiduciary responsibility and governance.
Instructors:
Von Hughes, Managing Director, PAAMCO Prisma

9:30 AM -10:30 AM Central Time

The NASP Institute (TNI) ****Trustees/Plan Sponsors/Investment Staff/Consultants ONLY (plus African trustees)***

Bond-nanza: A Review of Old and Burgeoning Fixed Income Sectors
With bond yields at historic lows in most of the developed world, many investors have been forced to rethink their fixed income allocations in order to meet their portfolio objectives. This prolonged market condition has put particular stress on traditional fixed income instruments that have historically played a critical role in institutional portfolios. In response, institutional investors are embracing alternative credit strategies that offer opportunities for higher rates of return relative to traditional fixed income. Those higher rates of return also come with added risks, as alternative credit strategies are typically less liquid, less regulated, and less transparent than their traditional counterparts. This session will seek to define the various segments within traditional and alternative credit, to highlight several key characteristics of these strategies, and to discuss real-time examples of the key risks and opportunities for institutional investors in today's market.
Instructors:
Kristin Johnson Ceva, PhD, CFA, Managing Principal, Payden & Rygel
Kevin Dockrell, Institutional Portfolio Manager – Credit Strategies, RBC
Scott Baskind, CIO & Head of Global Private Credit, Invesco

10:35 AM-11:35 AM Central Time

The NASP Institute (TNI) ****Trustees/Plan Sponsors/Investment Staff/Consultants ONLY (plus African trustees)***

Portfolio Analytics: How "Good" is your Fund

A benchmark serves an essential role in investing and allows investors to measure the relative returns and volatility of their total plan, their composite portfolios, and their individual managers. Benchmarks should set an appropriate expectation for the magnitude by which an investment portfolio's return should vary and under what market conditions that variance could be positive, neutral, or negative. There are many criteria an investor should consider when selecting the best-fit benchmark and under certain circumstances, two benchmarks may be best. Additionally, there are increasing requirements to integrate ESG factors into the investment process of all strategies, which may influence the choice of a benchmark, and, for many asset owners, evaluating non-sustainable and sustainable strategies to traditional investment metrics has been a challenge. This session will explore the importance of setting expectations through proper benchmarking and the various ways in which asset owners can evaluate and monitor traditional and ESG strategies and will also discuss the role of investment goals and objectives to determine the appropriate ways to measure how "good" a fund is.

Instructors:

Simone Andrews, ESG Credit Analyst, Bloomberg

Floyd Simpson, Senior Managing Consultant, PFM Group

11:40 AM - 12:40 PM Central Time

The NASP Institute (TNI) ****Trustees/Plan Sponsors/Investment Staff/Consultants ONLY (plus African trustees)***

Defensive Strategies in a Volatile and Uncertain Marketplace

Whether faced with managing liquidity within an uncertain interest rate environment, minimizing the impact of a historic oil supply/demand curve imbalance, or navigating an economy crippling global pandemic, we were reminded in 2020 of the difficulty of protecting funding statuses in a volatile environment. Now faced with the first recession in more than a decade after years of bullish returns, investors must now revisit utilizing different portfolio strategies across multiple asset classes to both protect principal while still seeking a positive return. By revisiting traditional defensive portfolio strategies available within the equity markets and exploring more diverse, complex multi-asset investing solutions, attendees will gain insights in how different managers are working to minimize the impact of high volatility while providing stable returns. By incorporating discussions around commodities, sector themes, and the evolving role of emerging markets, investors will reexamine the various tools at their disposal to build a defensive portfolio for a long-term investment horizon.

Instructors:

Rupal J. Bhansali, Chief Investment Officer and Portfolio Manager, International & Global Equities, Ariel Investments

Lowell Yura, Head of Multi-Asset Solutions, North America

Jeffrey Saret, Senior Vice President, Portfolio Strategist, The D.E. Shaw Group

All Attendees are invited to attend the Institutional, Municipal Finance, Professional Development, Brokerage or AEMS Tracks

12:45 PM - 1:30 PM Central Time

Africa & Emerging Markets Summit (AEMS)

New Chapter in MiDA Advisors and NASP Engagement

This session will introduce the MiDA Advisory vision and roadmap. We will highlight the Industry Partners initiative and successes of the NASP-MiDA Partnership and increasing allocations to diverse and emerging asset managers.

Moderator: Aymeric Saha, Managing Director, MiDA

Panelists: Sundeep Raichura, CEO, Zamara Actuaries, Administrators, Consultants, Ltd.
Henry Jones, President, Board of Administration, CALPERS

Tuesday; December 8, 2020

All Attendees are invited to attend the Institutional, Municipal Finance, Professional Development, Brokerage or AEMS Tracks

8:00 AM - 9:00 AM Central Time

NASP Morning Plenary
"Monetizing" Diversity
The financial industry recognizes the value of diversity; furthermore, research has demonstrated that diversity increases productivity, increases creativity, increases profits, improves employee engagement, reduces employee turnover and improves company reputation. However, the number of ethnic minority firms in the financial industry have decreased notably in recent years. This panel will explore what the industry is doing (and can do) to improve the growth and enhance the success of ethnic minority firms and thereby "monetize" diversity.
Moderator: Monica Bertran, Head of Corporate Communications Digital and Innovation, Bloomberg
Panelists:

Justin Dean, Boston Consulting Group

Carey Lathrop, Managing Director, Co-Head of Markets & Securities Services, Citi

Jasmine Richards, CFA, Senior Investment Director, Manager Diversity, Cambridge Associates

9:10 AM - 9:55 AM Central Time

Professional Development Series (PDS)
Concurrent Breakout Session: **Is the American Dream Dying - A Conversation About the US Economy and Rates**
This session will explore the state of credit markets in the wake of Covid and the US elections Additionally this fireside chat will provide insight in the future of the American dream of owning your own home and its long term effects on the country 's GDP growth.
Panelists:
Troy Dixon, Managing Partner and Chief Investment Officer, Hollis Park Partners
Erik Hall, Executive Director, GCM Grosvenor

9:10 AM - 9:55 AM Central Time

Institutional

***Concurrent Breakout Session:* Differentiated Equity: Micro Cap to Mega Cap and Beyond**

Long gone are the days of gaining equity exposure by simply investing in blue chip stocks. As investors move towards passive investing in equity, where are the opportunities for active management? This breakout session will explore how investors are gaining exposure to differentiated strategies in the public equity spectrum.

Moderator: Will Forde, CFA, CAIA, Senior Consultant, NEPC, LLC

Panelists:

William Heard, Founder, CEO & CIO, Heard Capital
Laura Kernaghan, Senior Director of Investments, Chicago Community Trust
Peter Zaldivar, Principal & Senior Portfolio Manager, Kabouter Management

9:10 AM - 9:55 AM Central Time

AEMS

***Concurrent Breakout Session:* Prosper Africa: Unleashing US-Africa Trade and Investment**

Established in 2018, Prosper Africa is an initiative that brings together the resources of over 15 U.S. Government agencies to connect U.S. and African businesses with new buyers, suppliers, and investment opportunities. In this panel discussion, executives from two of those agencies – USAID and the DFC – will discuss their independent and collaborative efforts to drive commerce and investment between the U.S. and the African continent.

Moderator: Nadine Mentor, Founder and President, Mentor Holdings and Investments Inc.

Panelists:

Debra Erb, Managing Director of Housing Real Estate Project Finance,United States International Development Finance Corporation

Cameron Khosrowshahi, Investment Officer, Office of Private Capital and Microenterprise, United States Agency for International Development (USAID)

9:10 AM - 9:55 AM Central Time

Municipal

***Concurrent Breakout Session:* State Treasurers' Roundtable**

Several of the most prominent treasurers in the country will discuss some of the challenges and opportunities they are facing and their plans to manage them-- with finite resources. In addition, the treasurer's will discuss the important role diversity will have as they work to achieve the investment objectives of the public funds they manage and finance their capital improvement programs.

Moderator: Guy Logan, Managing Director, Citi, Board Chair, NASP

Panelists:

Honorable Rachael Eubanks, Treasurer, State of Michigan
Honorable Bruno Fernandes, Treasurer, District of Columbia
Honorable Shawn Wooden, Treasurer, State of Connecticut
Honorable Colleen Davis, Treasurer, State of Delaware

9:10 AM - 9:55 AM Central Time

Brokerage

***Concurrent Breakout Session:* The Effects of COVID, Current Interest Rates and ESG on the Utility Sector**

Panelists will discuss the effect of COVID, current interest rates on the utility sector. Given 2020's shifts in usage due to increased working from home and reduced travel, what does the future hold in this sector? As we head into 2021, are this year's shifts in the market the "new normal" or still a temporary event?

Panelists:

Rejji Hayes, Executive Vice President & Chief Financial Officer, CMS Energy
Jon Haygood, Assistant Treasurer, Southern Company

9:10 AM - 9:55 AM Central Time

Sponsored by Morgan Stanley

***Concurrent Breakout Session:* Modern Wealth Management: A Career as a Financial Advisor**

In today's complex and volatile markets, it is imperative that individuals have the information and advice necessary to make sound investment and financial decisions. Hear how Morgan Stanley financial advisors leverage the firm's comprehensive capabilities and specialized services to assist clients in creating strategies to plan for their future, protect their wealth, and secure their legacy. Learn what it takes to build a successful career in wealth management from this dynamic panel of accomplished financial advisors.

Moderator: Justin Castleberry, First Vice President, Sub-Complex Manager, St. Paul, MN, Morgan Stanley

Panelists: Gail Covington, Senior Vice President, Financial Advisor, San Francisco, CA, Morgan Stanley
Antonio Monk, Senior Vice President, Financial Advisor, Dallas, TX, Morgan Stanley

Jesse Walton, Jr., Senior Vice President, Financial Advisor, Atlanta, GA, Morgan Stanley

10:05 AM - 11:35 AM Central Time

Women's Forum / Pacesetters Award Presentation

U.S. Congresswoman Joyce Beatty Remarks

This Forum will feature Black women working to make changes and expand opportunities in financial services for minority women. The forum will particularly focus on women in FinTech, global finance and finance entrepreneurship.

Remarks: U.S. Congresswoman Joyce Beatty, 3rd District of Ohio

Keynote: Carla Harris, Vice Chairman, Managing Director and Senior Client Advisor, Morgan Stanley

Moderator: Kim Evans, Senior Vice-President, Alternative Fund Services, Northern Trust

Panelists: Ingrid Jacobs, Vice President, Chief Diversity Officer, Eaton Vance
Robin Washington, Board of Directors, Alphabet
Tariye Gbadegesin, Managing Director & Chief Investment Officer, ARM-Harith Infrastructure Investment

11:35 AM - 1:05 PM Central Time

NASP Afternoon Plenary

Building a Dynamic Firm / Travers Bell Award Presentation

This session will discuss the operational, and due diligence challenges inherent in running your own firm and how to think strategically to overcome them. We will also discuss how working together with majority firms can yield additional dividends when it comes to entrepreneurial success.

Hosted by Boston Consulting Group

Moderator: Kedra Newsom, Managing Director and Partner, Boston Consulting Group

Panelists: Richard Turnley, Director of Institutional Sales & Marketing, Channing Capital
Sage Lincoln, Senior Research Director, Wells Fargo Investment Institute, Wells Fargo

1:30 PM - 2:15 PM Central Time

Professional Development Series

***Concurrent Breakout Session:* The Growth of Artificial Intelligence and How Technology is Disrupting Your Bottom Line Positively and Negatively**

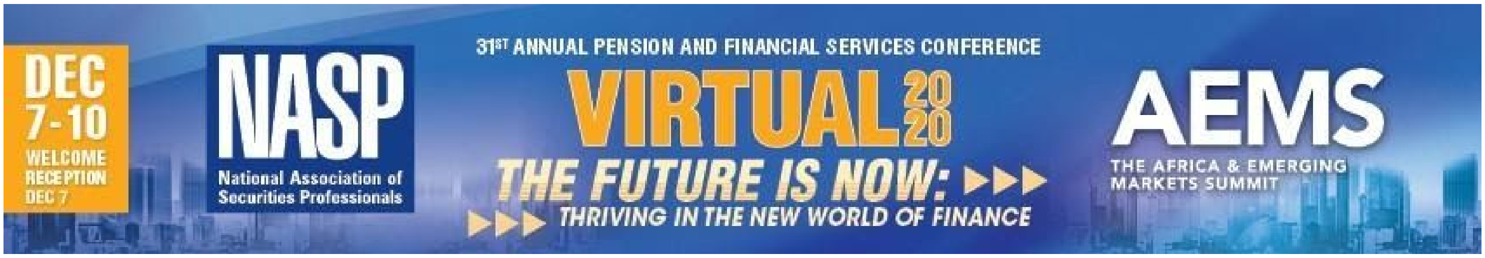
Long are the days of Uber and Airbnb as the household names for AI. Today, Regulators, Entrepreneurs, and Funds use technology to gain a competitive advantage. The rise in venture capital and capital raising on a global basis to the use of technology to fast track

access to data and deal sourcing is moving at lightning speed. While the cost of AI is often a consideration when addressing business bottlenecks, more and more market participants use AI and technology as a material variable to advancing their success. Ignoring the implementation of technology can cause an adverse effect.
Moderator: Dale Favors,
Panelists: Ashley Evans, Principal, Technology, Media and Telecom, Carlyle Group
Jordan McKinnie, Equity Data Insights Analyst, T. Rowe Price
Lynne M. Kostakis, Chief Administrative Officer & Head of Strategy, Institutional Asset Management, Northern Trust

1:30 PM - 2:15 PM Central Time
AEMS
***Concurrent Breakout Session:* Smart Cities**
By the year 2025 (in only 5 years) 45-50% of the population of Continental Africa will live in cities. There is a major urbanization trend that is taking place throughout continental Africa demanding a cohesive approach on how to adequately prepare to address this demographic tidal wave. Advanced thinkers on the subject believe that well planned advanced cities of the future (Smart Cities) will be required and that Africa will be a leading destination for these Smart Cities. Smart Cities create great opportunities for investments by providing a cohesive platform and master-planned approach to invest in major tenets of a Smart City: Energy, Technology, Food, Water, Infrastructure and healthcare. In fact, private equity and some hedge funds are organizing themselves to invest in these broad areas through a Smart City construct and a number of Smart City Funds are now being created to address these requirements. This is an eminently investable trend that will allow institutional investors to access the wave of Smart Cities that will be created over the next 25 years and in the process invest in the fastest growing continent in the world: Africa
Moderator: Marlon Brown, CEO, Clarendon Partners
Panelists:
Ndidi Nwueli, Managing Partner, Sahel Consulting Agriculture and Nutrition, Ltd.
Sola Lawson, Managing Director & Co-Head, African Infrastructure Investment Managers
Danladi Verheijen, Managing Director, Verod Capital

SCHEDULE OF EVENTS

Wednesday; December 9, 2020



All Attendees are invited to attend the Institutional, Municipal Finance, Professional Development, Brokerage or AEMS Tracks

8:00 AM - 8:45 AM Central Time

NASP Morning Plenary

Keynote Speaker: The Future of Capitalism

Dr. Nat Irvin, Assistant Dean of Thought Leadership and Civic Engagement, and Woodrow M. Strickler Chair, Professor of Management Practice, University of Louisville, College of Business

8:45 AM - 9:30 AM Central Time

NASP Morning Plenary

Economic Outlook - African Economic Outlook

Speaker: Dana Peterson, Chief Economist, Conference Board

9:30 AM - 10:15 AM Central Time

The ESG Ecosystem: The Players, Policies, Stakeholders and Everything in Between

No matter what you name it, one thing is certain, capital allocators of all types and from all geographies are proactively exploring the optimal ways to approach Sustainable and Impact Investing. Some are incorporating ESG principles in their investment policies, investing directly in impact portfolios and seeking to better understand how their external managers are incorporating ESG factors into the investment decision-making process. This session will provide a holistic view of the sustainable and impact investing space and explore key questions including:

- The ecosystem and approaches (i.e., negative screening, impact investing, thematic investing)
- Industry trends and myths about sustainable investing
- Market inefficiencies and the opportunity set, using ESG as a tool to identify risks, measuring impact
- How are DB and DC plans approaching sustainable investing?
- How will developments in the market continue to affect real assets such as commodities?
- What are ways in which corporate engagement and stewardship are evolving?

Moderator: Samantha Grant, CFA, CAIA, Marquette Associates

Panelists:
Jason M. Goins, CFA, Managing Director and Equity Research Analyst, Wellington Management Company LLP
Frances Barney, CFA, Managing Director, Head of Global Risk Solution, BNY Mellon

10:25 AM - 11:10 AM Central Time
Institutional
***Concurrent Breakout Session:* Technology That Excites**
Each year brings game-changing technology trends that shape how we live and how we do business – machine learning, artificial intelligence, cloud computing, and robotic automation, to name a few. This breakout session will explore burgeoning investment opportunities in technology for investors in public equity, private equity, and venture capital.

Panelists:
Rodrigo Garcia, Deputy Treasurer & Chief Investment Officer, State of Illinois
Khadir Richie, Principal, Richie Capital Group
Kelly Hardeman, Vice President, Insight Partners
Dr. Kola Olofinboba, Managing Partner, Fairview Capital

10:25 AM - 11:10 AM Central Time
Brokerage
***Concurrent Breakout Session:* Global Trading and How We Make It Work**
Learn from Global Trading experts as they discuss the changes wrought by COVID-19 on hiring, workflows, trading dynamics and risk management at corporate firms. They will also discuss the effects on trading volume and market volatility. Find out the lessons learned, as well as the ongoing organizational repercussions of the pandemic and navigating the continuing challenges ahead.
Moderator: Reggie Scantlebury, Managing Director, Stern Brothers
Panelists:
Stuart George, Division Director, Global Head of Equity Trading, Macquarie Investment Management
Paul Whitehead, Managing Director, Blackrock

10:25 AM - 11:10 AM Central Time
Municipal
***Concurrent Breakout Session:* U.S. Mayors' Roundtable**

Mayors throughout the U.S. will provide their insights on how COVID-19 has affected their cities, the pace of the economic recovery, and how social justice has influenced policy and legislative matters.
Moderator: Tray Hairston, Attorney, Butler Snow, LLP
Panelists:
Honorable Stephen K. Benjamin, Mayor, City of Columbia, SC
Honorable Keisha Lance Bottoms, Mayor, City of Atlanta, GA
Honorable Sylvester Turner, Mayor, City of Houston, TX

10:25 AM - 11:10 AM Central Time
Defined Contribution
***Concurrent Breakout Session:* Sponsored by Nationwide**
Bringing More Diverse Candidates to Financial Services
The time is now to collaborate and discuss how we can recruit more Black students and professionals to work in financial services. We have brought together a distinguished panel of guests from the industry and academia to discuss what it will take to build the pipeline for more diversity in Financial Services.
Moderator: Eric Stevenson, President, Workplace Solutions, Nationwide
Opening Remarks: Kristi Rodriguez, Vice President, Nationwide Retirement Institute,
Moderator: Eric Stevenson, President, Workplace Solutions, Nationwide,
Panelists: Mike James, President of Individual Solutions, NFP, MJames@NFP.com
Dr. Pamela Jolly, Chief Strategist, American College
Kayla Monroe, Data Measurement Consultant, MassMutual and Hampton University MBA Graduate

11:20 AM - 12:05 PM Central Time
Institutional
***Concurrent Breakout Session:* Let's Get Real: A Discussion on Real Assets**
Over the past decade, institutional investors have been steadily increasing their exposures to real assets for a variety of reasons that include diversification, yield, and inflation hedging. These increased allocations are not just simply in the form of real estate. Infrastructure (equity and debt), natural resources, commodities, and agriculture (to name a few) are becoming more prevalent in portfolios. This breakout session will explore the challenges and opportunities of investing in real assets across the spectrum.
Moderator: Avery Robinson, CAIA, Senior Vice President & Real Assets Co-Manager, Callan, LLC
Panelists: Reynold Martin, Managing Principal, Infrastructure and Energy, Allstate

David Cibrian, Chief Executive Officer, Co-Chief Investment Officer, and Co-Founder, American Triple I Partners
Jenny Chan, Head of Portfolio & Strategy, MIP Funds, Managing Director, Macquarie North American Private Funds

11:20 AM - 12:05 PM Central Time
AEMS
***Concurrent Breakout Session:* Re-Imagining Business Opportunities in the Next Big Growth Market**
Conversation with the Co-Authors of Africa's Business Revolution: How to Succeed in the World's Next Big Growth Market. As countries recover from the impact of the pandemic and rebuild, there will be a need to re-imagine viable business opportunities in emerging markets such as Africa. Global and Africa-based companies seeking to access new growth markets or pivot existing business strategies, will need to focus on opportunities that will leverage on Africa's young population, fast-growing and increasingly urbanized cities coupled with significant infrastructure gaps including social infrastructure and the challenges presented by the high twin deficits (fiscal and current). Scaling opportunities to drive attractive returns and broad reaching impact will require even more agility in frontier markets such as Africa. The panel provides the inside story on business in Africa and its future growth prospects and helps attendees understand and seize the opportunities for building profitable, sustainable enterprises on the African continent. The Panel will feature leading CEOs from key sectors including ICT, Manufacturing, Energy and top African Institutional investors.
Moderator: Tariye Gbadegesin, Managing Director & Chief Investment Officer, ARM-Harith Infrastructure Managers
Panelists:
Mitchell Elegbe, Chief Executive Officer, Interswitch
Sean Long, Chief Executive Officer, Denham Capital
Richard Okello, Co-Founding Partner, Sango Capital

11:20 AM - 12:05 PM Central Time
Municipal
***Concurrent Breakout Session:* A Practitioners Perspective to Financing Transportation Infrastructure: Present and Future**
This panel will facilitate a discussion with large transportation issuers to hear their approaches to funding large project or program of projects, describe what tools work well, where there are challenges, and where they see opportunities for the future.
Moderator: Matt Bernstein, Director, Citi – Transportation Group

Panelists:
Horatio Porter, Chief Financial Officer, North Texas Tollway Authority
Erin Roseman, Chief Financial Officer, Transbay Joint Powers Authority
Dr. Shawn Wilson, Secretary, State of Louisiana Department of Transportation & Development

11:20 AM - 12:05 PM Central Time
Brokerage
***Concurrent Breakout Session:* Corporate Pensions**
This chat with two of the major corporate pension fund allocators will be moderated by one of the most successful marketing and client service professionals. Get the "Straight Talk" about how you need to be prepared for partnership with corporate pension plans. Learn what corporate plans are looking for in their emerging managers and what their needs are, as well as how to position your firm for successful outcomes.
Moderator: Obie McKenzie, Vice Chair, Cordiant Capital
Panelists: Dekia Scott, Chief Investment Officer, Southern Company
Gbenga Oladeji, Managing Director, Johnson & Johnson

12:15 PM - 1:05 PM Central Time
NASP Afternoon Plenary
CIO Panel
NASP's annual Chief Investment Officer panel will get the perspectives of CIOs from various sectors about their responses to the pandemic, how they are advancing ongoing diversity initiatives, and how they are working with leadership to turn the calls for social and racial justice into a sustainable movement.
Moderator: Shundrawn Thomas, President, Northern Trust Asset Management
Panelists:
Doug Brown, Chief Investment Officer, Exelon Corporation
Nickol Hackett, Chief Investment Officer, Joyce Foundation
Michael Frerichs, Treasurer, State of Illinois

1:05 PM - 2:05 PM Central Time
Joyce Johnson Recognition
Fireside Chat
Mellody Hobson, President & co-CEO, Ariel Investments
Arlene Isaacs-Lowe, President, Moody's Foundation

2:15 PM - 3:45 PM Central Time
One on One Career Coaching + Corporate Sponsors Corner

SCHEDULE OF EVENTS

Thursday; December 10, 2020

All Attendees are invited to attend the Institutional, Municipal Finance, Professional Development, Brokerage or AEMS Tracks

9:00 AM - 10:00 AM Central Time
NASP Morning Plenary
Fireside Chat with Elected Officials / Maynard Jackson Jr. Award Presentation
Moderator: Senator James F. Clayborne, Jr., Partner, Clayborne and Wagner, LLP
Panelists: Honorable Lori Lightfoot, Mayor, City of Chicago
Honorable Toni Preckwinkle, President, Cook County Board
Honorable JB Pritzker, Governor, State of Illinois

10:10 AM - 11:10 AM Central Time
NASP Morning Plenary
Conference Roundtable
Is there a declining trend in diverse manager programs and support? Why? How can this be addressed? Audience interactive with NASP facilitator to lead the discussion.
Facilitator: Dr. Nat Irvin, Assistant Dean of Thought Leadership and Civic Engagement, and Woodrow M. Strickler Chair, Professor of Management Practice, University of Louisville, College of Business

11:20 AM - 12:20 PM Central Time
NASP Afternoon Plenary

Consultant CEO Roundtable

Moderator: Donna Sims Wilson, Chief Operating Officer, Kah Capital, Past-President, NASP Board

Panelists: Ron Peyton, CEO, Callan, LLC

Samuel Austin, III, Partner, NEPC, LLC

SCHEDULE OF EVENTS

Post – Conference Sessions; Wednesday, December 16, 2020

9:00 AM - 9:45 AM Central Time
Professional Development Series
Concurrent Breakout Session: **The Changing Environment of LPs:**
The sophistication of the investor community from family offices, public and private plans through corporations has resulted in a growth in direct investments coupled with a series of new demands for the public and private fund community. LPs have created robust in-house teams and a new set of criteria for overseeing their own portfolios and investment models. Today, new LP demands reach far beyond the fee structure and exit models. With direct investments and the risk of competing with the LP community for deal flow, how the GP community competes and continues to advance demands cutting edge approaches to accessing data, deal flow and even exploring more of a global reach.
Moderator: Nanette Aguirre, Partner, Greenberg Traurig, LLP
Panelists:
Robert Greene, President & CEO, National Association of Investment Companies
Kirk Sims, Head of Emerging Manager Program, Texas Teachers' Retirement System
Kyle Marmelstein, Investment Director, Crewcial Partners
Tiffany McGhee, Partner, Chief Executive Officer and Co-CIO Institutional Investment Services, Momentum Advisors

9:00 AM - 9:45 AM Central Time

Institutional

***Concurrent Breakout Session:* Getting to Know Our Neighbors: Foundations & Endowments**

This breakout session will guide attendees through various allocation approaches of well-known foundations, endowments, and outsourced CIOs, providing insight into potential partnership opportunities.

Moderator: Miguel Thames, Founder, T.I.G. Advisory

Panelist:

Caroline Greer, CIM, Managing Director, Commonfund

Sharcus Steen, CAIA, Director of Investments, University of Maryland Foundation

Matthew Wright, Founder and CIO, Disciplina

Reginald Sanders, CFA, CAIA, Director of Investments, Kellogg Foundation

9:00 AM - 9:45 AM Central Time

AEMS

***Concurrent Breakout Session:* Dispatches from Africa, The CIO's Travelogue**

Candid conversation with Chief Investment Officers and Plan Sponsors who have traveled and invested in Africa.

Moderator: Runa Alam, Chief Executive Officer, Development Partners International

Panelists:

Joseph Boateng, Chief Investment Officer, Casey Family Programs

Jarred Glansbeek, Chief Executive Officer, Riscura

Angela Miller-May, Chief Investment Officer, Chicago Teachers' Pension Fund

9:00 AM - 9:45 AM Central Time

Municipal

***Concurrent Breakout Session:* Benefits of a Diverse Investor Base**

This panel will highlight what issuers can do to maximize the diversity of institutional investors in their bond issuances. Panelists will discuss best practices in conducting investor outreach. Specifically, how to successfully market to domestic and international investors during a pandemic.

Moderator: Natasha Holiday, Managing Director, Municipal Markets, RBC

Panelists:

Marjorie Henning , Deputy Comptroller, New York City

Simone Santiago, Senior Municipal Bond Trader, Eaton Vance

Sonelius Kedrick-Brown, Head of Corporate Treasury & Taxable Fixed Income Solutions, DWS – Deutsche Bank

9:00 AM - 9:45 AM Central Time

Brokerage

***Concurrent Breakout Session:* COVID, Currency and Carbon**

This session will explore the intersection between the following three concepts: COVID: How supply chain disruptions and labor shortages experienced during the pandemic has compelled manufacturers to invest in automation & robots, and to consider 3D printing as way to bring manufacturing closer to home; Currency: How the perceived loss of American exceptionalism and a rising deficit has contributed to dollar weakness, while benefiting the yuan and the euro; Carbon: How stimulus bills to recover from COVID-related recessions are directing billions of dollars into low-carbon initiatives like renewable energy, electric mobility and EV charging, and hydrogen fuel infrastructure.

9:55 AM - 10:40 AM Central Time

Plenary: The Social of ESG: Investing in Diversity and Inclusion

2020 has seen strong calls for social, economic and racial change. Firms will need to keep top of mind the diversity and inclusion implications of these bids for change. How can ESG social goals be met while maintaining financial growth goals? What will ESG look like in 2021 and beyond as more investors look to invest in socially conscious ways?

Panelists: Caleb Tuten, Investment Analyst, Sustainable Investment Lead, Wells Fargo Investment Institute

Perry Hollowell, Guggenheim

Emily Lawrence, Senior Vice President, Director, Senior Specialist of Sustainable Investing, Northern Trust

