



Ninth Annual Endowment, Foundation and Philanthropy Conference
Thursday June 14, 2018
Convene Cira Center
2929 Arch Street, Philadelphia, PA

Agenda

7:30 AM - 8:20 AM

Registration and Breakfast

8:20 AM - 8:30 AM

Welcome and Introductions

Jeremy Bach, CFA, Bach Capital Advisors, LLC
Jeffrey Lauterbach, J.D., Lauterbach & Co.

8:30 AM - 9:20 AM

Panel A: CIO Panel

Endowment CIO's and other top investment professionals share their ideas on the market, opportunities and risks.

Moderator: Jeremy Bach, Bach Capital Advisors, LLC
Frank Grunesich, CFA, Swarthmore College
Mark Hamilton, Hirtle Callaghan
Don Walker, CFA, Board of Pensions of the Presbyterian Church, USA

Panel B: Impact of Tax Reform on Giving

The new tax law has many not-for-profits concerned about whether the law will curtail charitable giving. This discussion will provide several expert opinions on the law's impact.

Moderator: Laura Solomon, J.D., Laura Solomon & Associates
Joanne Florino, Cornell University
Alexis McCarthy, Triskeles Foundation
Alexander Reid, J.D., Morgan Lewis

9:30AM - 10:20 AM

Panel A: Building an ESG Portfolio

The discussion on ESG has long focused on whether to incorporate ESG factors into a portfolio. This panel take the discussion a step further and focuses on the actual implementation of an ESG portfolio.

Moderator: Michael Cosack, ImpactWise
Diane Keefe, BeneStream, Inc.
Deborah Spalding, CFA, Commonfund
Kristina Wahl, Barra Foundation
Jennifer Wu, Blackrock

Panel B: Impact of Endowment Tax on Endowments

The recently enacted federal legislation levies a tax on the endowment income of colleges and universities with large funds.

Moderator: Jeremy Tennenbaum, CFA, Vanguard
Kari Fazio, Bryn Mawr College
Christopher M. Pekula, Kreischer Miller
Karen Miller, Templeton Foundation

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| 10:20 AM - 10:40 AM | Networking Break |
| 10:40 AM - 11:30 AM | Morning Keynote: Gerard Baker, Editor-in-Chief, Wall Street Journal |
| 11:40 AM - 12:30 PM | <p>Panel A: Outsourced CIO 3.0 <i>The outsourced CIO (OCIO) business has taken off over the past decade, but an increasingly crowded marketplace is making it hard for businesses to thrive.</i></p> <p>Moderator: John Griffith, Hirtle Callaghan Louis Mayer, Stevens Institute of Technology Nanci Morris, CFA, Kidderbrook OCIO Search Group Chris Van Wyk, Peddie School</p> <p>Panel B: The Financial Health of Philadelphia Area Non-Profits <i>A new report by Oliver Wyman, SeaChange Capital Partners, and GuideStar reveals that a significant number of Greater Philadelphia nonprofits are struggling financially.</i></p> <p>Introduction: Nadya K. Shmavonian, SeaChange Capital Partners John MacIntosh, SeaChange Capital Partners</p> |
| 12:30 PM - 2:00 PM | <p>Luncheon and Networking</p> <p>Luncheon Keynote: Lessons Learned from a Career in the E&F World</p> <p>Moderator: Churchill Franklin, Acadian Asset Management LLC Alice Handy, Former Founder and CEO, Investure Jay Willoughby, CFA, Chief Investment Officer, TIFF</p> |
| 2:10 PM – 3:00 PM | <p>Panel A: The Search for Uncorrelated Returns <i>A discussion on where investors can find products that will provide uncorrelated returns that will protect in the event of a downward moving market.</i></p> <p>Moderator: Mark Hoffman, CFA, PNC Charmaine Chin, Franklin Templeton/K2 Drew Dinger, CFA, CAIA, Haverford College Lauren Ferry, Schroders Mark McKenna, Blackrock</p> <p>Panel B: Governance for Organizational Risk Management <i>Effective risk management gives comfort to stakeholders that the business is being effectively managed and helps the organization confirm its compliance with corporate governance requirements.</i></p> <p>Moderator: Jeffrey Lauterbach, J.D., Lauterbach & Company Patrick Callihan, Tech Impact Jeremy Tennenbaum, CFA, Vanguard Wayne Walker , Walker Nell Partners</p> |
| 3:10 PM - 4:00 PM | <p>Panel A: Investing with the Gender Lens <i>Gender-lens investing is rapidly growing in popularity as it integrates gender-based factors with the goal of promoting more gender equality while potentially enhancing returns.</i></p> <p>Moderator: Mary Jane Bobyock, CFA, SEI Dianne Benner, CFA, Appotomatix Kelly Coyne, PaxWorld Robyn Polansky Morrison, Align Laura LaRosa, Glenmede</p> |

Panel B: The Current State of Fundraising

After the devastating donation drop-off during the recession years, giving levels continue their steady climb. That's good news for nonprofits and it comes with an outlook of cautious optimism for fundraising in 2018.

Moderator: Lucy Momjian, CFA, Vanguard
Patrick Feeley, Caron Treatment Centers
Marcie Merz, J.D., University of Pennsylvania
Maureen Murphy, VNA Philadelphia
Joe Tomulo, Gift Planning Development, LLC

4:00 PM – 5:00 PM

Networking Reception

Registration Fee:

CFA Society Members (all Societies): \$110.00

Non-Members: \$195.00

Non-Profits Professionals: \$110.00

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