

MERCER NOT-FOR-PROFIT AND PRIVATE WEALTH INVESTMENT SUMMIT

THROUGH THE LOOKING GLASS: NAVIGATING AN UNPREDICTABLE WORLD

ST. LOUIS, MISSOURI
SEPTEMBER 25–27, 2017

AGENDA

MONDAY, SEPTEMBER 25, 2017

5:00–7:00 pm	Welcome Reception Jessica Portis, Investments Leader — Not-for-Profit Segment, Mercer	Ballroom Prefunction
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TUESDAY, SEPTEMBER 26, 2017

7:30–8:30 am	Breakfast	Ballroom Salon II
8:30–8:45 am	Welcome and Opening Jessica Portis, Investments Leader — Not-for-Profit Segment, Mercer	Ballroom Salon I
8:45–8:50 am	Day 1 Master of Ceremonies Carissa Tepovich, Senior Investment Consultant, Mercer	Ballroom Salon I
8:50–9:40 am	Day 1 Keynote Address: Be Careful What You Wish For Ben Inker, Head of Asset Allocation, GMO	Ballroom Salon I
9:40–10:10 am	Networking Break	Ballroom Prefunction
10:10–10:55 am	Globalization in a Fragile World: Is it Time for a Re-think? Anthony Brown, Head of Strategic Research — US, Mercer Geoff Wilson, Senior Investment Consultant, Mercer	Ballroom Salon I
10:55–11:10 am	Lightning Talk: Hedge Funds — Is the Value Proposition Intact? Dave McMillan, Chief Investment Officer — Hedge Funds, Mercer	Ballroom Salon I
11:10–11:55 am	The Long and Short of Disruptive Technology — A Conversation With Criterion Capital Stephen Ewen, Deputy Chief Investment Officer — Hedge Funds, Mercer Christopher Lord, Co-Founder and Managing Partner, Criterion Capital Management	Ballroom Salon I

12:00–1:15 pm	Networking Lunch	Ballroom Salon II
1:15–1:55 pm	BREAKOUT SESSION 1 <ul style="list-style-type: none"> An OCIO in Every Lunch Box Travis Pruitt, US Business Leader — Not-for-Profit OCIO Services, Mercer Practical Implementation of ESG Today Beth Johnson, Senior Investment Consultant, Mercer Michael Forestner, Global Chief Investment Officer — Mercer Private Markets Operational Due Diligence/Best Practices Freeman Wood, Head of North America Mercer Sentinel Group, Mercer Church Pension Plan Investment Strategy Chris Ebersole, Senior Investment Consultant, Mercer Mike Ancell, Senior Investment Consultant, Mercer 	Ballroom Salon I Promenade, level 2 Consulate, level 2 Ambassador, level 2
2:00–2:40 pm	BREAKOUT SESSION 2 <ul style="list-style-type: none"> An OCIO in Every Lunch Box Travis Pruitt, US Business Leader — Not-for-Profit OCIO Services, Mercer Practical Implementation of ESG Today Beth Johnson, Senior Investment Consultant, Mercer Michael Forestner, Global Chief Investment Officer — Mercer Private Markets Operational Due Diligence/Best Practices Freeman Wood, Head of North America Mercer Sentinel Group, Mercer Church Pension Plan Investment Strategy Chris Ebersole, Senior Investment Consultant, Mercer Mike Ancell, Senior Investment Consultant, Mercer 	Ballroom Salon I Promenade, level 2 Consulate, level 2 Ambassador, level 2
2:40–3:10 pm	Networking Break	Ballroom Prefunction
3:10–3:40 pm	50 Shades of Litigation Paul Staples , Central Market Defined Contribution Segment Leader, Mercer Austin Roberds , Senior Investment Consultant, Mercer Joe Libbra , Senior Investment Consultant, Mercer	Ballroom Salon I
3:40–4:25 pm	CIO Roundtable Moderator: Ken Shimberg , Chief Investment Officer — Not-for-Profit Segment, Mercer Panel: John Barker , Chief Investment Officer, Partners HealthCare Jason MacDonald , Director of Investments — Rutgers, The State University of New Jersey Sally Staley , former Chief Investment Officer, Case Western Reserve University	Ballroom Salon I

4:25–4:30 pm	Day 1 Close	Ballroom Salon I
5:30 pm	Bus to Arrive at Hotel	Meet at exit near Ballroom
5:45 pm	Bus to Leave for Baseball Game	
7:15 pm	Cardinals/Cubs Baseball Game (food will be served)	Busch Stadium

WEDNESDAY, SEPTEMBER 27, 2017

7:30–8:30 am	Breakfast	Ballroom Salon II
7:30–8:30 am	Optional Breakfast: New Committee Member Bootcamp Russ LaMore, US Foundation Segment Leader, Mercer	Pavilion, level 2
7:30–8:30 am	Optional Breakfast: Health System Enterprise Risk Management Mike Ancell, Senior Investment Consultant, Mercer David Axelson, Healthcare Segment Leader, Mercer	Promenade, level 2
8:30–8:35 am	Opening and Day 1 Recap Blake Hill, Investment Consultant, Mercer	Ballroom Salon I
8:35–9:20 am	Expanding Your Fixed Income Toolbox Moderator: Bryon Willy, Senior Manager Research Consultant, Mercer Panel: Marc Feliciano, CIO and Managing Director, Deutsche AM Erik Savi, Global Head of Infrastructure Debt, BlackRock Craig Palmer, Principal, Golub Capital	Ballroom Salon I
9:20–10:10 am	Day 2 Keynote Address: The Trump Administration: Fatter Policy Tails and Implications for the Markets Libby Cantrill, Executive Vice President and Head of Public Policy, PIMCO	Ballroom Salon I
10:10–10:40 am	Networking Break	Ballroom Prefunction
10:40–11:25 am	Healthcare Venture Capital — Revisiting a Best Idea Moderator: Erik Sebusch, Private Markets Investment Consultant, Mercer Panel: Carl Gordon, PhD, Founding Partner and Co-Head Global Private Equity, Orbimed Jay Lichter, PhD, Managing Director, Avalon Ventures/COI Ventures Peter Svenilson, Founder and Managing Partner, The Column Group	Ballroom Salon I
11:25–11:35 am	Lightning Talk: Viewing Spending Policies Through a Different Lens Christopher Adkerson, Higher Education Segment Leader, Mercer	Ballroom Salon I

11:35 am– 12:00 pm	Hire or Fire? The Rationale Behind Fund Manager Selection and Termination Shaum Shrinivas , Senior Investment Consultant and Portfolio Manager, Mercer	Ballroom Salon I
12:00–12:10 pm	Conference Wrap-up Travis Pruitt , US Business Leader — Not-for-Profit OCIO Services, Mercer	Ballroom Salon I
12:30–1:30 pm	Optional Lunch — A Century of Style Premia Toby Moskowitz , Professor of Finance, Yale School of Management	Ballroom Salon II