

Schedule

Thursday, November 2, 2017

9:00 am **Conference Chairman's Opening Remarks**

Agecroft Partners, Doug Rothschild, *President*

9:15 am **Hedge Fund Consultants' Roundtable**

Moderator: Sadis & Goldberg, Ron Geffner, *Partner*

Aon, Chris Walvoord, *Partner, Global Head of Hedge Fund Research*

NEPC, Neil Sheth, *Partner, Director of Alternative Asset Research*

Pension Consulting Alliance, John J. Burns, *CFA, Managing Director*

Segal Marco Advisors, Alan Kosan, *Senior Vice President, Head of Alpha Investment Research*

10:00 am **Which Hedge Fund Strategies Look the Most Attractive Over the Next 24 Months?**

Moderator: Harneys, Oliver Bell, *Partner*

Aberdeen Asset Management, Kevin Lyons, *Senior Investment Manager*

Advanced Portfolio Management, Robert Kiernan, *CEO*

EnTrustPermal, Robert Kaplan, *Senior Managing Director*

JP Morgan Alternative Asset Management, Paul Zummo, *CFA, CEO & CIO*

Lone Peak Partners, Betsy Battle, *CIO*

11:00 am **Coffee Break & Networking**

11:30 am **Direct Lending & Other Less Liquid Hedge Fund Strategies**

Moderator: CAIA Association, Bill Kelly, *CEO*

Analytical Research, Jerett Yelton, *Senior Analyst*

Corbin Capital, Craig Bergstrom *CFA, Partner, CIO*

Deutsche Asset Management, Chris Umscheid, *Director, Hedge Fund Research*

Helmsley Trust, Warren Tye, *CFA, Investment Officer*

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12:15 pm **Lunch**

1:00 pm **Family Offices**

Moderator: Backstop Solutions Group, Stephen Vondrak, *Vice President, Institutional Sales*

FERI Trust GmbH, Marcus Storr, *Head of Hedge Funds*

Merrimac Corp., Clark Cheng, *CFA, FRM, CIO*

Pendyne Capital, Andy Fisher, *CFA, CIO*

Sirius Partners, Brad Beatty, *CFA, CIO*

1:45 pm **The State of the Hedge Fund Industry**

Agecroft Partners, Don Steinbrugge, *CFA, CEO*

2:15 pm **Opportunities in Fixed Income Oriented Hedge Fund Strategies**

Moderator: Agecroft Partners, Doug Rothschild, *President*

Gapstow Capital Partners, Chris Acito, *Founder, CEO & CIO*

Hywin Capital Management, Gib Dunham, *CFA, Managing Director*

Man FRM, Tom Williams, *CFA, CIO Pine Grove Funds*

Russell Investments, Cedric Fan, *CFA, Senior Portfolio Manager*

3:00 pm **Afternoon Break**

3:30 pm **Benefits of Investing in Emerging Mangers**

Moderator: Baker Tilly Virchow Krause, John Basile, *Partner*

Appomattox Advisory, Susan Webb, *Founder, CEO & CIO*

Lighthouse Partners, Timothy Berry, *CFA, Managing Director*

PAAMCO, Robert Motoshige, *Director*

Protégé Partners & MOV37, Adil Abdulali, *President & Chief Science Officer*

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4:15 pm **Endowments & Foundations**

Moderator: Robbins Geller Rudman & Dowd, Robert Rothman, *Partner*
Episcopalian NY Diocesan Investment Trust, John Trammell, *President*
Harry and Jeanette Weinberg Foundation, Jonathan Hook, *CIO*
UJA - Federation of New York, Colin Ambrose, *CFA, CIO*
Verger Capital Management, Jim Dunn, *CEO & CIO*

5:15 pm **Cocktail Party & Networking**

Friday, November 3, 2017

7:30 am **Breakfast & Networking**

9:00 am **Where Are the Opportunities in Long Short Equity & What Makes a Good Manager?**

Moderator: Optima Fund Management, Erik Welle, *Partner*
Alternative Investment Group, David Storrs, *President & CEO*
Maverick Capital, Bates Brown, *Head of Hedge Fund of Funds*
Private Advisors, Charles Honey, *Partner*
Talsen Partners, Dominic Napolitano, *Founder & Managing Member*

9:45 am **Opportunities in Quant & Global Macro**

Moderator: Lyxor Asset Management, Fabien Pavlowsky, *Head of US Product Development*
Cliffwater, Chris Solarz, *CFA, Managing Director, Head of Global Macro Strategies*
GAM, Arvin Soh, *Portfolio Manager*
K2 Advisors, Robert Christian, *Senior Managing Director, Head of Investment Research*
Silvercrest Asset Management, Michael Dubin, *Managing Director*

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10:30 am **Coffee Break & Networking**

11:00 am **Which Hedge Fund Strategies Protect Capital During a Market Sell Off?**

Moderator: Agecroft Partners, Andrew Feldman, *Managing Director*
CIBC Atlantic Trust, Ohm Srinivasan, CFA, *Managing Director, Portfolio Manager - Hedge Funds*
Clearbrook, Tim Ng, *CIO*
Massey Quick Simon & Co., Wayne Yi, CFA, *Director, Head of Manager Research*
SECOR Asset Management, Philip DiDio, *Portfolio Manager*

11:45 am **Use of Hedge Funds to Enhance the Risk Adjusted Returns of an Overall Institutional Investment Portfolio**

Moderator: Agecroft Partners, Cara Fleckenstein, *Managing Director*
Alaska Permanent Fund, Ben Chang, *Senior Associate*
Aptitude Investment Management, Jeffrey Klein, *Deputy CIO & CEO*
Fairfax County Retirement Systems, Katherine Molnar CFA, *Senior Investment Officer*
The Ministers and Missionaries Benefit Board, Matthew Sherwood, *Senior Manager, Public Markets*
United Technologies Corporation, Jason Josephiac, CFA, CAIA, *Senior Investment Analyst*