



# RISK

## Investing in a Low Return Environment – Risk, Governance and Return

*Sixteenth Annual  
National Pension and  
Institutional Investor Summit*

A Forum for  
Private and Public  
Plan Sponsors

**November 15-16, 2010  
Dallas, Texas**

*Designed for pension and foundation/endowment  
executives, trustees, investment officers, consultants  
and representatives of financial institutions.*

### Featured Speakers



**Todd W. Wakefield**  
Managing Director  
and Portfolio  
Manager, The Boston  
Company's US  
Small, Small Mid and  
Micro Cap Growth  
Investment Team



**John H. Welch**  
Chief Strategist,  
Emerging Markets,  
Macquarie Capital



**Tycho van Wijk**  
Senior Investment  
Manager Equities,  
Lead Manager of ING  
Global Opportunities



**Presented by The National Society of Institutional Investment Professionals**

This event is proudly hosted by The Metroplex Members of the  
Dallas Chapter of the Society of Pension Professionals

**SUMMIT CO-CHAIRS****Randy Stalnaker**

Employees' Retirement Fund of the City of Dallas (Past Chair)

**John E. Thompson, Jr.**

Energy Future Holdings Corp.

**SUMMIT COORDINATOR****William J. (Bill) Blythe**

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**UNDERWRITERS**

The Boston Company Asset Management

ING Investment Management Americas

**SPONSORS****Joseph Anderson**

Texas Instruments

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Kimberly-Clark Corporation

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Employees Retirement System of Texas (Retired)

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Celanese Corporation

**Paul Brown**

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**John M. Casey**

Oncor Electric Delivery

**Bruce Cox**

Fort Worth Employees' Retirement Fund

**Todd Cox**

Fort Worth Employees' Retirement Fund

**Wyatt Crumpler**

American Airlines

**Mike Curran**

MTA Harris County (TX) Retirement Plan

**Larry Eddington**

Dallas Police and Fire Pension System (Past President)

**Brady Edwards**

Lower Colorado River Authority

**Gilbert Andrew Garcia**

Metropolitan Transit Authority of Harris County

**Howard Harpster**

Texas Children's Hospital

**James B. Harrell**

World Giving Community Foundation

**Stanley Hayes**

El Paso Firemen &amp; Policemen's Pension Fund

**Paula Herring**

Meadows Foundation

**James Hille**

Texas Christian University Endowment

**Sampson (Sam) K. Jordan**

Austin Police Retirement System

**Kristina L. Keever-Smith**

Texas Scottish Rite Hospital

**Randy Kopsa**

National Boy Scouts of America

**Lisa Ivie Miller**

Texas Fire Fighters' Pension Commissioner

**Robert Milone**

Methodist Hospitals of Dallas

**Patrick O'Connor**

Cook Children's Health Foundation

**Daniel E. O'Grady**

AT&amp;T Inc.

**David J. Pittman**

PIMCO Marketing Consultant

**Gary Ratiiff**

Texas Tech University System

**Larry Reed**

Fire and Police Pension Fund, San Antonio

**Ruth T. Ryerson**

Fort Worth Employees' Retirement Fund

**Jenny Shannon**

Triumph Group

**Steve Shaw**

Dallas Police &amp; Fire Pension System

**Randy Stalnaker**

Employees' Retirement Fund of the City of Dallas (Past Chair)

**Robert J. Stanton**

El Paso Firemen &amp; Policemen's Pension Fund

**Mitchell L. Stone**

Fluor Corporation

**Phillip Tencick**

Army &amp; Air Force Exchange Service

**John E. Thompson, Jr.**

Energy Future Holdings Corp.

**Lance Usrey**

Fort Worth Employees' Retirement Fund

**Joe H. Wright**

Baptist Foundation of Texas

# Sixteenth Annual National Pension and Institutional Investor Summit

## PROGRAM OUTLINE

**MONDAY, NOVEMBER 15, 2010****6:00 – 7:00 pm****Reception****TUESDAY, NOVEMBER 16, 2010****8:15 a.m. Breakfast and Registration****8:45 a.m. Welcome****Randy Stalnaker**

Program Co-Chair, Employees' Retirement Fund of the City of Dallas (Past Chair)

**John E. Thompson, Jr.**

Program Co-Chair, Energy Future Holdings Corp.

**Carl T. O'Connell**

The Boston Company Asset Management, LLC

**Darren Massey**

ING Investment Management

**9:00 - 9:45 a.m. Speaker****John H. Welch**

Macquarie Capital

**“Investing in the Emerging Markets with Special Emphasis on Latin American”****9:45 - 10:45 a.m. Panel — Defining, Measuring and Managing Risk**

Speaker:

**Karin Franceries, J.P. Morgan Asset Management**

Moderator:

**Jenny Shannon, Triumph Group**

Panelists:

**Alan Parikh, Hewitt Investment Group****Phillip Tencick, Army and Air Force Exchange Service****10:45 - 11:00 a.m. Break****11:00 a.m. - 12:00 p.m. Panel — Due Diligence, Portfolio Monitoring, Documentation**

Speaker:

**Rob McCormish, TeamCo Advisers**

Moderator:

**Randall L. Kopsa, Boy Scouts of America, National**

Panelists:

**Felicia Finston, Baker Botts****Stanley Hayes, El Paso Firemen & Policemen's Pension Fund****Carl Strutz, AT&T Inc.****12:00 - 1:30 p.m. Luncheon Speaker****Tycho van Wijk**

ING Global Opportunities

**“The Next Normal”****1:30 - 2:15 p.m. Panel — Approaches to Liability Driven Investing**

Moderator:

**Adriana Posada, American Airlines**

Panelists:

**Patrick DeRoy, UBS Global Asset Management****Alan Parikh, Hewitt Investment Group****2:15 - 3:00 p.m. Speaker****Todd W. Wakefield**

The Boston Company

**“Economic Update and Consumer Discretionary”****3:00 - 3:15 p.m. Break****3:15 - 4:15 p.m. Panel — Return Challenges Facing Asset Allocation Strategies**

Moderator:

**Dan O'Grady, AT&T Inc.**

Panelists:

**James Hille, Texas Christian University Endowment****Ed Peters, First Quadrant****Steve Shaw, Dallas Police & Fire Pension System****Mark Taborsky, PIMCO****4:15 - 4:30 p.m. Concluding Remarks****4:30 - 5:30 p.m. Reception****Online Registration at [www.nsiip.org](http://www.nsiip.org)**

For more information, contact:

**National Society of Institutional Investment Professionals**

P.O. Box 572796 • Houston, TX 77257-2796

713-829-3465 • Fax: 1-866-910-2109

[nsiip@att.net](mailto:nsiip@att.net)

# REGISTRATION

*Sixteenth Annual  
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**Online registration available at [www.nsiip.org](http://www.nsiip.org)**

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## SUMMIT REGISTRATION

*Online registration available at  
[www.nsiip.org](http://www.nsiip.org)*

### MARK THE APPROPRIATE CATEGORY(S)

- Pension Fund (Corporate & Public) and Foundation Executives, Trustees and Administrative Staff Only..... \$ no fee
- Summit Registration Fee for Others.... \$1,800
- I will attend the Monday night (Nov. 15) Reception.
- I will attend the Tuesday (Nov. 16) Luncheon
- I will attend the Tuesday afternoon (Nov. 16) Reception.

### HOTEL RESERVATIONS

Please contact the **Dallas Marriott Quorum** (972-661-2800). Convention rate: \$165 single/double per night. To receive this special group rate, remember to let the reservation agent know you are attending the National Pension and Institutional Investor Summit. Register online at [www.nsiip.org](http://www.nsiip.org).

### METHOD OF PAYMENT

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