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*The Boston Company*  
*Asset Management, LLC*

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*ING Investment Management*

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**Value Added  
Ideas for Your  
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**Risk, Governance and Return**

**Seventeenth Annual  
National Pension and  
Institutional Investor Summit**

**PROGRAM**



**Dallas Marriott Quorum Hotel**  
**Dallas, Texas**  
**Tuesday, November 15, 2011**

Coordinated By:

**THE NATIONAL SOCIETY OF INSTITUTIONAL  
INVESTMENT PROFESSIONALS**

Summit Underwritten By:

**THE BOSTON COMPANY ASSET MANAGEMENT, LLC**  
**and**  
**ING INVESTMENT MANAGEMENT**

## **8:00 - 845 a.m. Breakfast and Registration**

## **8:45 a.m. Invocation and Pledge of Allegiance**

**Bruce Cox** Fort Worth Employee's Retirement Fund

**Todd Cox** Fort Worth Employee's Retirement Fund

## **8:50 a.m. Welcome**

**Ruth T. Ryerson** Co-Chair, Fort Worth Employee's Retirement Fund

**John E. Thompson, Jr.** 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. Kickoff Speaker**

**Christine Hurtsellers** ING Investment Management U.S.

**“Debt and Deficit Crises: Navigating the Realities of a Deleveraging World”**

## **9:45 - 10:45 a.m. Panel - LDI - De-risking in a low and rising interest rate environment**

**Speaker:** **Dan Tremblay**, Fidelity Investments

**Moderator:** **Jennifer Shannon**, The Aerospace Corporation

**Panelists:** **Wyatt Crumpler**, American Airlines

**Gary Knapp**, Prudential

**Joe Ramos**, Lazard Asset Management

## **10:45 - 11:00 a.m. Break**

## **11:00 - 12:00 p.m. Breakouts**

**Breakout No. 1: DC Plans - Retirement income and inflation protection, Developing the final payout phase**

**MC:** **John Pickett**, CAPTRUST Advisors

**Speakers:** **Drew Carrington**, UBS Global Asset Management

**Chip Castille**, Blackrock

**David Deming**, Dimensional Fund Advisors

**Breakout No. 2: Public plans - Defending your Defined Benefit Plan**

**Speaker:** **Rocky Joyner**, The Segal Company

## **Breakout No. 3: Foundations, Endowments and Private Offices - Issues**

**Moderator:** **Randy Kopsa**, Boy Scouts of America, National

**Panelists:** **Rodric E. Cummins**, GuideStone

**Byron Gossett**, The Bridgeworks Group

**Paula Herring**, Meadows Foundation

## **12:00 - 1:30 p.m. Luncheon Speaker**

**Jack Malvey** BNY Mellon

**“Asset Management in The Great Transition Age”**

## **1:30 - 2:30 p.m. Panel - Alternatives - Seeking return/reducing risk**

**Speaker:** **David Perry**, TeamCo Advisers

**Moderator:** **Matt DenBleyker**, Larry Thompson & Associates

**Panelists:** **Clint Carlson**, Carlson Capital

**Robert Hulme**, Fort Worth Employees' Retirement Fund

**Sandy Kaul**, Citi Prime Finance

**Jerry Swank**, Swank Capital

## **2:30 - 3:30 p.m. Panel - CIO Outsourcing - How much control to delegate, the role of staff, and the manager selection process**

**Speaker:** **Ed Berman**, Neuberger Berman Trust Company

**Moderator:** **Joe Wright**, Baptist Foundation of Texas

**Panelists:** **Ed Berman**, Neuberger Berman Trust Company

**Clinton Cary**, Hewitt EnnisKnupp

**Heath Miller**, Shepherd Kaplan

**Wanda Valentine**, Fort Worth Employees' Retirement Fund

## **3:30 - 3:45 p.m. Break**

## **3:45 - 4:45 p.m. Panel - Real Return - Investing in infrastructure, commodities, TIPs, and real estate**

**Speaker:** **Nicholas Koutsoftas**, GE Asset Management

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

**Panelists:** **John Abunassar**, William Blair

**Tim Bray**, GuideStone

**Karen McQuiston**, Jennison Associates

**Joyce Shapiro**, Franklin Templeton Real Asset Advisors

## **4:45 - 5:00 p.m. Closing Remarks**

## **5:00 - 6:00 p.m. Reception**