

DFW Institutional Investment FORUM

2024 Mission Statement and Strategy



Mission Statement

The DFW Institutional Investor FORUM (FORUM) was created to promote the exchange of information and education for the benefit of a broad audience of institutional (and qualified) investors and consultants. We wish to build community for institutional investors by offering opportunities to network with like-minded Plan Sponsors, Endowments & Foundations, Consultants, and others whose operational issues may require more detailed engagement in a confidential environment.

Advisory Board

The Advisory Board was established to advise the FORUM “Administrators” on meeting topics, ideas of interest, and the meeting formats on an ongoing basis. Members of the Advisory Board will serve a (one-year) term. Members of the Advisory Board will primarily be asset allocators or consultants.

Target Audience

The goal is to bring a broad range of institutional investors and opinions together in a FORUM where all investors will benefit from the different perspectives each brings. While the focus is on investing strategies, we will consider having some meetings to address topics of specific interest to different groups, such as Foundations & Endowments, Corporate and Public Plan Sponsors, and Family Offices.

Our Meetings

1. In 2024 we have scheduled six general meetings and expect to add at least one special meeting.
2. Meetings are typically from 11:30 AM to 1:00 PM at the Park City Club, 5956 Sherry Lane on the 17th Floor.
3. Meetings will typically include lunch, a time to network, and an educational speaker or roundtable discussion on a topic of interest set by the Advisory Board.
4. At least (4) meetings will have a wide appeal to a broad group of investors and the other (2) may be for specific allocator subgroups, such as public funds, or DC plans, or foundations, etc. and may limit or exclude money managers or we may simply add a specific allocator subgroup meeting after the regular meeting.
5. We will primarily have in-person meetings but may have some special virtual meetings.
6. We may include a social event, such as an afternoon event followed by a happy hour.

Membership options

1. The membership fee for allocators will be \$150 for the year 2024.
2. The membership fee for managers / vendors will be \$850 for 2024 and they will be expected to invite an allocator to each meeting they attend. Membership is mandatory to attend any meeting.
3. We will work closely with the Advisory Board to address adjustments in the cost as needed.
4. Members will get access to special meetings at discounted prices or be free.

Membership for 2024

Please join us as a member and enjoy the full year. We look forward to in-person meetings with educational and networking opportunities. We will focus on the desires of asset allocators and try to include some meetings for specific asset allocator subgroups, such as DC plans or DB plans or E&F, etc.

Our first special meeting in 2024 will be the annual State of the US and Texas Economies early in 2024, which will be held at the Dallas Federal Reserve.