



DFW Institutional Investment FORUM 2026 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 2026 we have scheduled six general meetings and 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. Six meetings will have a wide appeal to a broad group of investors.
5. We may add special meetings that may appeal to specific allocator subgroups, such as public funds, or DC plans, or foundations, etc. and may limit or exclude money managers.
6. We will primarily have in-person meetings but may have some special virtual meetings.
7. 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 2026.
2. The membership fee for managers / vendors will be \$1,100 for 2026 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 2026

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 at least one meeting for the allocators ONLY.

Our first special meeting in 2026 will be the annual State of the US and Texas Economies in early 2026, which will be held at the Dallas Federal Reserve.