



National Tour 2017

Leadership Acceleration and Capital Access

Austin, Texas * May 17-18

Institutional Investor Roundtable meetings are reserved for NAA Inc. members and Institutional Investors. Members not available to participate in meetings may designate a representative from their respective firms. Forum and Reception participation is reserved for NAA Inc. members and invited guests. Invitations are not transferable.

Schedule of Events

Wednesday, May 17

Austin, TX

4:00 PM – 4:30 PM

Welcome Reception and Registration

4:30 PM – 5:30 PM

Leadership Accelerator / Latina Caucus Roundtable

Brenda Alfaro, Vice President, Business Development, LM Capital Group

Sylvia Bell, Director, Emerging Managers Program, Teachers Retirement System of Texas (TRS)

Milton Berlinski, Co-Founder, Managing Partner, Reverence Capital

Danielle Beyer, Interim Chief Executive Officer, New America Alliance

Peggy Caldwell, Senior Vice President, Progress Investment Management

Stephen Cammock, Vice President, GCM Grosvenor

Judy Canales, Consultant, Judith A. Canales

Eyna Canales-Zarate, Retired Elected Member, City of Austin Employees' Retirement System

Melford Carter, Principal, GCM Grosvenor Private Markets

T. Karen Charleston, Trustee, Teachers Retirement System of Texas (TRS)

Albert Cortez

Nora de Hoyos Comstock, Ph.D., Place 6 Board Member, Austin Community College District

Manny Garcia, Deputy Executive Director, Texas Democratic Party

LeAnn Gola, Senior Associate, Teachers Retirement System of Texas (TRS)

Manuel Gonzalez Mestre, CGI Investment Management LLC, CGI General Partner Advisory Board Member

Leticia Ha

Diana Maldonado, Financial Advisor, Morgan Stanley

Carmen Ortiz-McGhee, Senior Vice President, Aon Risk Services

Erin Patten, Chief Marketing Officer, Potency

Gabriel Rodriguez, Managing Director, Empiric Institutional

Jesse Sandoval, ROCA Partners

Ravi Sarin, Investor, ROCA Partners

Sengal Selassie, Managing Partner, Brightwood Capital Advisors, LLC

Tom Soto, Managing Partner, Frontier Impact Capital

Rosie von Lila, Founder, Director of Communications, Lumera

5:30 PM – 6:30 PM

Leadership Accelerator / Latina Caucus Reception

Thursday, May 18

Austin, TX

Co-Hosted By:

Employees Retirement System of Texas

8:30 AM – 9:30 AM

Welcome Breakfast *(Reserved for NAA Inc. members, Trustees, and Institutional Investors)*

10:00 AM – 11:00 AM

Employees Retirement System of Texas (ERS) *(Confirmed - Reserved for NAA Inc. members, ERS Trustees, and ERS)*

Adriana Ballard, Private Equity Analyst

Sharmila Chatterjee Kassam, Deputy Chief Investment Officer

Amy Cureton, Real Estate Portfolio Manager

Lauren Honza, CFA, Strategic Research Investment Analyst

Panayiotis Lambropoulos, Hedge Fund Portfolio Manager

Michael McCrary, External Management Analyst

John McCaffrey, Investments Division Specialist

Tom Tull, Chief Investment Officer

11:30 AM – 1:00 PM

Institutional Investor Lunch

Topic of Discussion: [Diversifying Investments, Knight Foundation Study](#)

(Reserved for NAA Inc. members, Trustees, and Institutional Investors)

City of Austin Employees' Retirement System (COAERS) (Confirmed)

Christopher Hanson, Executive Director

Employees Retirement System of Texas (ERS)

Sharmila Chatterjee Kassam, Deputy Chief Investment Officer

Tom Tull, Chief Investment Officer

Northern Trust (Confirmed)

Margret Duvall, Solutions Strategist; Multi-Manager Solutions; Asset Management

Teachers Retirement System of Texas (TRS) (Confirmed)

Sylvia Bell, Managing Director, Emerging Manager Program and Investment Operations

T. Karen Charleston, Trustee

LeAnn Gola, Senior Associate, Emerging Manager Program

Andrew Padilla, Associate, GCM

University of Texas System Investment Management Co. (Confirmed)

Patrick Pace, MD, Senior Director, Healthcare and Lower/Middle Markets

1:30 PM – 2:30 PM

Teacher Retirement System of Texas (TRS) (Confirmed - Reserved for NAA Inc. members, TRS Trustees, and TRS)

Sylvia Bell, Managing Director, Emerging Manager Program and Investment Operations

LeAnn Gola, Senior Associate, Emerging Manager Program

Andrew Padilla, Associate, GCM

3:00 PM – 4:00 PM

Pre-Forum Break

Sponsored By:

Progress Investment Management Company

4:30 PM – 4:50 PM

Welcome Reception and Registration

5:00 PM – 5:30 PM

Forum Opening

R. David Kelly, Chairman, Teacher Retirement System of Texas (TRS)

5:30 PM – 6:00 PM

Research Update: Emerging Managers

Jose Balagot, Deputy Chief Investment Officer, Progress Investment Management Company

6:00 PM – 7:30 PM

Forum Reception