



EPIC 2016

ERISA Pension Investment Conference

The Royal Sonesta – Hilton Head, SC

Agenda

TUESDAY, APRIL 19

4:00 – 6:00 PM

CONFERENCE REGISTRATION
(Ballroom Foyer)

6:00 – 9:00 PM

WELCOME RECEPTION
(Beach Pavilion)



EPIC 2016

WEDNESDAY, APRIL 20

7:00 – 8:00 AM

BREAKFAST (Savannah Room)

8:00 – 8:30 AM

OPENING CEREMONY

Mitch Green, CEO – Investment Performance Services, LLC

8:30 – 9:30 AM

SESSION I: MARKET SIGNALS: WHAT THE FINANCIAL MARKETS ARE TELLING US NOW

Following the herd has rarely produced superior long-term results. Tulane University's Peter Ricchiuti will share his informative and entertaining perspective on financial markets, the importance of proper diversification, and the cyclical nature of both stocks and investment sectors. He will also discuss the unusual securities research program he heads up with his students.

Presenter – Peter Ricchiuti

IPS Moderator – Mitch Green, CEO

9:30 – 10:15 AM

SESSION II: SEEKING RETURNS IN PUBLIC MARKETS

Long-term return assumptions continue to trend lower across asset classes. This panel will discuss market conditions that drive opportunities, examine how to mitigate risk, and explore where attractive returns can be found in the public equity and fixed income markets.

Panelists:

Henrik Strabo – Rainier Asset Management

Martin Robinson – Wedge Capital Management

Andy Toburen – Chartwell Investment Partners

IPS Moderator – Jennifer Mink, Principal

10:15 – 10:30 AM

BREAK

10:30 – 11:15 AM

SESSION III: IS NOW THE TIME TO INVEST IN PRIVATE EQUITY?

As investors continue to search for alternative sources of alpha in their portfolios, private equity may offer an answer. This session will address the different means of implementation, key determinants to a successful private equity program, as well as the risks, misconceptions and expectations investors should have for a private equity investment.

Panelists:

Kathy Rosa – J.P. Morgan

Tom Kerr – Hamilton Lane

Jon Levin – GCM Grosvenor

IPS Moderator – Dan Melloh, CAIA, Director of Manager Research

11:15 – 12:00 PM

SESSION IV: INSIDE IPS MANAGER RESEARCH

Our clients regularly see the results of IPS' manager research through ongoing manager recommendations and approved search lists, but how do we get there? This session offers an inside look at the IPS manager research process, including sourcing and screening investment managers for use in client portfolios, as well as an overview of the due diligence process.

Presenters:

Dan Melloh, Director of Manager Research

Greg White, Consultant | Manager Research Analyst

IPS Moderator – Rich Sichel, President



EPIC 2016

THURSDAY, APRIL 21

7:00 – 8:00 AM

BREAKFAST (Savannah Room)

8:00 – 8:15 AM

ANNOUNCEMENTS

Mitch Green, CEO – Investment Performance Services, LLC

8:15 – 9:15 AM

SESSION V: GLOBAL ECONOMIC OVERVIEW

This session will provide an overview of the ever-changing financial and geopolitical landscape and its effects on markets in the US and globally. The outlook for equity and fixed income markets, market volatility, interest rates and energy/commodity prices will be topics of discussion.

Presenters:

Kent Hogshire – BlackRock

Michael Trudel – BlackRock

IPS Moderator – John Statts, Chief Investment Officer

9:15 – 10:00 AM

SESSION VI: OPPORTUNISTIC INVESTMENT STRATEGIES

How do investment managers identify unique opportunities across asset classes? The panelists in this discussion represent firms that offer a cross-section of alternative investment opportunities. This session will discuss expectations for these niche strategies and how to utilize opportunistic investments to complement an investment portfolio.

Panelists:

Gregg Hymowitz – EnTrust

Henry Chyung – Post Advisory Group

John Cocke – Corbin Capital

Dan Nielsen – Great Lakes Advisors

IPS Moderator – David Russell, Senior Investment Strategist

10:00 – 10:15 AM

BREAK

10:15 – 11:00 AM

SESSION VII: THE LEGAL & REGULATORY LANDSCAPE

As a plan fiduciary, it is imperative to stay well-informed regarding the current legal and regulatory issues facing plan sponsors. This session will provide an overview current of legislation and case law impacting ERISA fiduciaries.

Panelists:

Jack Widman, Esq. – Susanin, Widman & Brennan, P.C.

Robert Sichel, Esq. – K&L Gates

Shaamini Babu, Esq. – Saltzman & Johnson Law Corporation

IPS Moderator – Rich Sichel, President

11:00 – 11:15 AM

BREAK

11:15 – 12:15 PM

SESSION VIII: LEADERSHIP: TAKING CHARGE

One of the most admired men in America, General Colin Powell has been a leader for most of his life. Not only has General Powell led troops as a military leader, he served as Chairman of the Joint Chiefs of Staff under President George H. W. Bush, and as Secretary of State under President George W. Bush. General Powell; however, believes a leader is more than just a title. Drawing on examples garnered from experience as both a leader on the world stage and as eyewitness to leadership in action, General Powell addresses precisely what it takes to be a leader and provides strategies for “taking charge” during times of great change and great crises. General Powell demonstrates how to remain focused, take responsibility and work towards improving processes, organizations, and people.

Presenter – General Colin Powell

IPS Moderator – Mitch Green, CEO



EPIC 2016

FRIDAY, APRIL 22

7:00 – 8:00 AM

BREAKFAST (Savannah Room)

8:00 – 8:15 AM

ANNOUNCEMENTS

Mitch Green, CEO – Investment Performance Services, LLC

8:15 – 9:15 AM

SESSION IX: LANDMARK: THE INSIDE STORY OF AMERICA'S HEALTHCARE LAW

Based on the book, *LANDMARK*, which Ms. Connolly co-authored as a member of the Washington Post national reporting staff, she takes an in-depth look at President Obama's healthcare law and what the future holds in the next administration. Ms. Connolly also analyzes the latest trends hitting health care and what they mean for consumers, businesses, and the industry itself.

Presenter – CeCi Connolly

IPS Moderator – Brian Hicks, Principal

9:15 – 10:00 AM

SESSION X: THE IMPORTANCE OF ASSET ALLOCATION AND ACTIVE REBALANCING

Asset allocation is the key determinant of a successful investment portfolio. This session will discuss the fundamentals of building a portfolio, the importance of appropriate diversification, strategies for managing risk, and how to effectively rebalance.

Presenter – David Russell, Senior Investment Strategist

IPS Moderator – Greg White, Consultant

10:00 – 10:15 AM

BREAK

10:15 – 11:00 AM

SESSION XI: OPPORTUNITIES IN REAL ESTATE

Equity real estate has consistently provided attractive returns, but how long can this cycle continue? This session will focus on where we are in the market cycle, address risk factors, and identify opportunities beyond core real estate.

Panelists:

Peter Palandjian – Intercontinental Real Estate Corp.

Chris Macke – American Realty Advisors

Corey Carlson – Washington Capital Management

Claiborne Johnston – Invesco Ltd.

IPS Moderator – Stephen Lange, Managing Principal

11:00 – 11:15 AM

BREAK

11:15 – 12:00 PM

SESSION XII: ACHIEVING YOUR PERSONAL BEST

From his humble beginnings in war-torn East Africa to becoming one of the greatest runners of our time, Meb Keflezighi brings a higher meaning to “going the distance”. Meb overcame extraordinary barriers and continuously emerged a champion. He is the only athlete in history to win the Boston Marathon, the New York City Marathon, and an Olympic Medal, which is effectively referred to as the Marathon Triple Crown. Transcending his own personal achievements, Meb inspires others to go the distance in their own lives and achieve their personal best -physically, personally, and professionally.

Presenter – Meb Keflezighi

IPS Moderator – Jennifer Mink, Principal

12:00 PM

CLOSING REMARKS

Rich Sichel, President – Investment Performance Services, LLC