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**34TH ANNUAL
FINANCIAL SERVICES
CONFERENCE**

JULY 24-26, 2023

PHILADELPHIA LOEWS HOTEL



Macquarie Asset Management is proud to sponsor the **34th Annual NASP Financial Services Conference**

We are committed to supporting NASP's mission of helping people of color and women achieve inclusion in all aspects of the financial services industry.

To learn more about our commitment to diversity, equity and inclusion visit, www.macquarie.com/au/en/careers/diversity-equity-and-inclusion.html

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MCASD-3540-AD-NASP (XXXXXX-06/23)

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Greetings Everyone,

Welcome to the National Association of Securities Professionals 34th Annual Financial Services Conference. We are delighted to have NASP members, member firms, strategic partners, the NASP Philadelphia Chapter, and our sister organizations, Association of Black Securities and Investment Professionals (ABSIP) and MiDA Advisors here in Philadelphia, Pennsylvania for several days of thought-provoking solutions-oriented sessions, addressing the challenges and opportunities of business diversity within financial services.

Since our last conference, we have been encouraged by the engagement and the continued focus of those who provide governance and leadership of the financial services industry. We are also encouraged by the partnership of the private-sector in developing strategies and committing financial resources and senior-level leadership to the issues of structural inequities within capital markets.

During this conference, we will discuss issues and processes which can be deployed to accelerate inclusive business practices and shares solutions that can scale for sustain success.

This Conference, along with the other programs that NASP conducts throughout the year could not be done without the guidance, advice, and engagement of our NASP Board, Advisory Council, NASP Program Committee, NASP staff, and our strategic business partners and other like-minded organizations. I want to thank each of you for your unwavering support. We look forward to many more years of engagement, partnerships and support, in delivering the mission of NASP.

Again, welcome to the NASP Financial Services Conference, and we will see you in Atlanta in 2024!

REIMAGINE - RETHINK - RECOMMIT



Sincerely,



Ronald C. Parker

WELCOME LETTER

Dear Friends,

It is my pleasure to welcome you to the National Association of Securities Professionals (NASP) 34th Annual Financial Services Conference. As the Chair of the NASP Board of Directors, I am honored to welcome you to the City of Philadelphia on behalf of the NASP Board of Directors and its 500+ members.

First, I want to thank the NASP Program Chairs and Planning Committee and NASP Staff for putting together a deeply rich and thought provoking conference, assembling a phenomenal group of Financial Services Experts (Public Officials/ Fund Managers/ Asset Allocators & Asset-Owners) to share their experience and insights with us at this conference.

During the past two years of my role as NASP Board Chair, we have been faced with several challenges and opportunities as an organization. We have been fortunate to re-establish relationships with our members and member firms, establish new relationships with congressional leaders and policy makers and strengthening our NASP brand by partnering with our NASP Chapters and other like-minded organizations.

As we move towards a new era, where the value of diversity, equality, and inclusion is being questioned, we must continue to demonstrate and highlight the value that business diversity adds to the financial services industry.

I want to thank you personally for your continued support of the NASP mission!



Thank you and Enjoy the Conference,

A handwritten signature in black ink that reads "Richard Turnley". The signature is written in a cursive, flowing style.

Richard Turnley, III
NASP Board Chair
National Association of Securities Professionals

WELCOME LETTER

ACHIEVE GREATER



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Councilman – 5th District

July 14, 2023

Dear National Association of Securities Professionals:

On behalf of the City Council of the City of Philadelphia, we would like to welcome the National Association of Securities Professionals to our city for its 34th Annual Financial Services Conference.

This year, you will be gathering more than 500 finance industry professionals to celebrate the strides made around diversity in the financial sector, as well as hold challenging and stimulating discussions on current diversity efforts. As President of our City Council, diversity, fairness, equity and inclusion are paramount to my legislative leadership role and to the City of Philadelphia as a whole. We are particularly excited to host NASP this year.

The City of Philadelphia will be well-represented at the Conference, with several members of our Board of Pensions and Retirement in attendance or speaking with the Conference audience via interactive breakout and plenary sessions.

We hope that you take advantage of the many activities we have to offer, as well as support our locally-owned, minority businesses throughout Philadelphia. We wish you the best of luck for the Conference and look forward to hosting you again soon. Enjoy your time in Philadelphia!

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President, Philadelphia City Council

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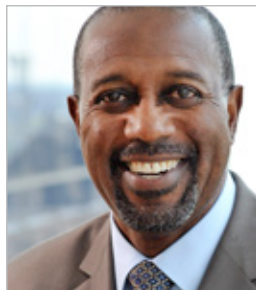
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The Plan Sponsor Advisory Committee (PSAC) is comprised of an impressive group of advisors that have graciously agreed to attend the conference, evaluate the program content to assist in future planning, and encourage other key influencers to attend.

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Making a Way



A PROFESSIONAL CORPORATION

Welcome to the members and participants of the
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NASP has been making a way and finding a way for minorities and women in the financial services industry since its first pension fund conference in 1989.

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JOYCE JOHNSON AWARD

Mary Pugh

Chief Executive Officer, Pugh Capital Management

Mary Pugh is the founder and CEO of Pugh Capital. She began her career at Washington Mutual as an investment analyst. She rose to the level of Senior Vice President of the Portfolio Management Division. When she and co-founder, Scott Greiwe established the firm in 1991, their vision was to create a diverse Seattle-based fixed income firm that clients would view as a trusted partner. Washington Mutual became the firm's first client and opened a \$5 million account. Pugh Capital has grown organically over the years and manages over \$10 billion in assets for institutional clients. Under her leadership, Pugh Capital has grown to become the largest African American female owned fixed income firm in the country. Mary has been an advocate and champion for diversity, equity, and inclusion in both her professional career and personal life.



From the beginning, the co-founders shared a passion for fixed income investing. They enjoyed researching macroeconomic dynamics and constructing portfolios that helped clients to achieve their goals. They also appreciated the chance to work in the investment field in their hometown of Seattle and wanted to create that opportunity for others. Under Mary's stewardship, Pugh Capital has built a firm that attracts, develops, inspires, and retains exceptional and diverse talent. We strive to build an organization that employees believe is a "Best Places to Work" and clients view as a preferred firm to work with. Pugh Capital was honored to be selected by Pension & Investments as one of the Best Places to Work in Money Management in the small manager category from 2018 - 2022*.

Mary is committed to using her expertise, talent, and passion to make a positive societal impact. She

has a long history of community engagement and enjoys providing opportunities to elevate the success and experiences of young people. She is on the board of the Rainier Scholars Endowment Fund and the Dean's Advisory Board for Seattle University's Albers Business School. Mary is the Program Chair of the Greater Seattle (WA) Chapter of the Links' award-winning Building STEAM program which works with middle school girls of color. Mary is a member of the Seattle Chapter of the International Women's Forum

and on the board of the Washington Roundtable and Washington State Investment Board. Over the years, she has served on numerous boards including the University of Washington Medical Center, the Seattle Branch of the San Francisco Federal Reserve Bank, Washington Mutual, Cascade Natural Gas, The Seattle Foundation, and the YMCA of Greater Seattle. Mary graduated from Yale University with a B.A. in Economics.

Mary has received numerous awards. Most recently, in 2022 she was recognized as one of the Puget Sound Business Journal's Power 100 Executives. In 2018 she was honored with the Federal Reserve Bank of San Francisco's Fed Family Distinguished Service Award. In 2017 she received the Seattle Storm Inspiring Women Award and in 2016 she was honored with Seattle Business Magazine Executive Excellence Award as a CEO of the Year.

*For information about the Pensions & Investments Best Places to Work distinction and the CEO of the Year Award 2016, Seattle Business Magazine, please visit www.pughcapital.com. Awards listed in this article do not pertain to the services provided by Pugh Capital and are not reflective of the quality of investment management or services provided.

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YOUNG PROFESSIONALS AWARD

Antoinette Bing

*Senior Vice President, Marketing & Client Service,
Leading Edge Investment Advisors*



Antoinette joined Leading Edge Investment Advisors in July of 2020 as Senior Vice President and is responsible for marketing and client service for the firm. Antoinette champions the voice of the client across all business functions and leads client engagement which includes onboarding, reporting, client/product strategy, and new business development. Antoinette is a member of the Investment Committee and the Compliance Committee.

Antoinette was the Director of Client Service & Marketing at Metis Global Partners where she managed client service, marketing, operations, and compliance. Prior to that, Antoinette served as the Director of Marketing and Client Services at Herndon Capital Management where she was responsible for the execution of long-term strategic growth initiatives. During her tenure, she led the marketing, client service and consultant relations efforts for the firm. Early in her career, Antoinette worked on the sell-side where she was responsible for institutional sales and trading, operations, and compliance.

Antoinette earned an Executive MBA with a concentration in Strategy and Leadership from the University of North Carolina, Kenan-Flagler Business School – Chapel Hill and a Bachelor of Business Administration in Finance from Saint Joseph's University. She has also passed the National Association of Securities Dealers Series, 24, 7, 55, 65 and 63 certification examinations. Antoinette serves on the Board of Directors for the National Association of Securities Professionals (NASP) and as the President of the Northern California Chapter. She also serves as a steering committee member for the Investment Diversity Advisory Council (IDAC).

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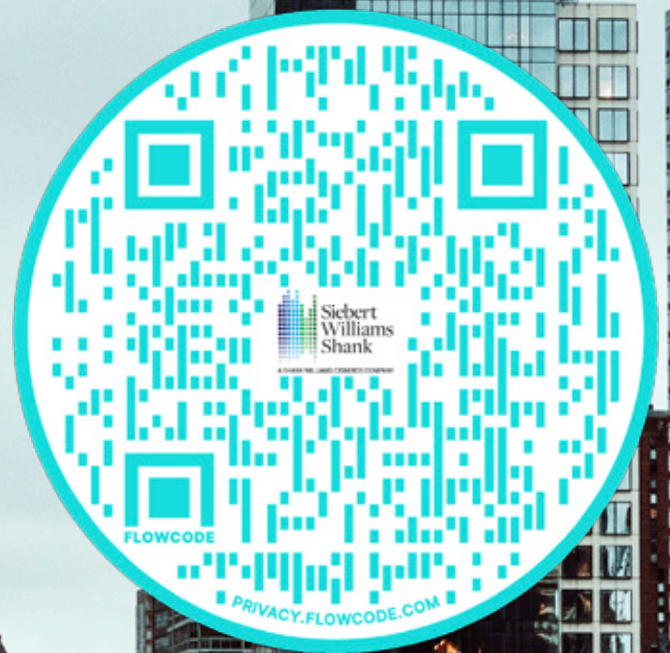
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TRIVERS J. BELL, JR. AWARD**Eddie Brown, CFA, CIC**

*Founder, Executive Chairman & Senior Portfolio Manager,
Brown Capital Management*



Eddie C. Brown started Brown Capital Management on July 1, 1983. He is chairman of the firm's board of directors and a member of the Management Committee, the firm's governing body. Eddie boasts over 40 years of investment experience, serving as VP and portfolio manager at T. Rowe Price Associates, Inc. for 10 years before starting his own firm in 1983. He earned a BS in electrical engineering from Howard University, an MS in electrical engineering from New York University, and an MBA from the Kelley School of Business at Indiana University. He holds the professional designations of CFA and CIC. Eddie received honorary doctor of humane letters degrees from Howard University, Johns Hopkins University and Maryland Institute College of Art (MICA), an honorary doctorate in public service from Morgan State University, and an honorary doctor of business administration from McDaniel College. Additionally, he served as a member of the board of directors of the Open Society Institute–Baltimore and of the National Cabinet-Woodrow Wilson International Center for Scholars. Eddie's community and philanthropic efforts are extensive. Eddie has been recognized as a distinguished alumnus by Howard University and the Kelley School of Business at Indiana University. He was appointed to the ERISA Advisory Council by the U.S. Secretary of Labor, where he served a three-year term. Eddie was also a regular panelist for 25 years on the nationally televised "Wall Street Week With Louis Rukeyser" and was inducted into the program's hall of fame. He is the author of *Beating the Odds—Eddie Brown's Investing and Life Strategies*.



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LIFETIME ACHIEVEMENT AWARD

David Baker Lewis

Of Counsel, Lewis and Munday P.C.



David Baker Lewis is Of Counsel to Lewis & Munday, a Detroit based law firm with offices in New York City, Washington, D.C. and Glastonbury, CT. David has served on the boards of numerous professional, educational, civic and community organizations. He is a former assistant professor at the former Detroit College of Law and a former member and Chairman of the Board of Trustees of Oakland University. He is a former director of H & R Block, STERIS Corp., The Kroger Company, Comerica, Inc., TRW, Inc., LG&E Energy Corp., M.A. Hanna Company and Consolidated Rail Corporation (CONRAIL).

In addition to his civic, corporate and community activities, David has specialized in municipal finance law, serving as Lewis & Munday's lead attorney on numerous and diverse municipal bond offerings. He is a past director of the National Association of Bond Lawyers and former chairman of the National Association of Securities Professionals.

David received his Bachelor of Arts degree from Oakland University, his Master of Business Administration degree from The University of Chicago Booth School of Business and his juris doctorate degree from The University of Michigan Law School.

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JOYCE JOHNSON AWARD

The Joyce Johnson Award was created by NASP as a tribute to co-founder Joyce Johnson whose mission was to make a difference for minorities and women professionals in the securities industry. The award recognizes true leaders whose efforts best exemplify the advancement of the ideals and principles of NASP.



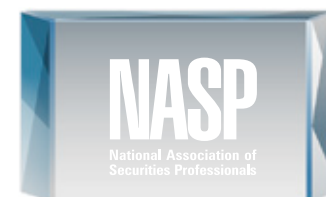
Irene Elmore '91
Maxine Waters '92
Rose Harper-Elder '93
Angela S. Green '94
Charles P. Valdes '95
Denise L. Nappier '96
Patricia A. J. Garrick '97
Bari-Ellen Roberts '98
Gail M. Pankey '99
Della Hood-Laster '00
Joan M. Pratt '01
Brenda Wright '02
Mary A. Collins '03
Judith Rice '04
Myrna M. Rivera '05
Pamela Scott '06

Gail Perry Mason '07
Carol G. Stukes '08
Vicki R. Palmer '09
Donna Sims Wilson '10
Mona S. Williams '11
Catherine E. Pugh '12
Kathleen Colin '13
Gwendolyn L. Butler '14
Mellody Hobson '15
Linda Joyce Jordan '16
Norce R. Rice '17
Sherry Mose '18
Sidney Dillard '19
Dekia Scott, CFA '20
Shawna A. Ferguson, M.Ed, CCDP/AP '21
Congresswoman Joyce Beatty '22

PAST AWARD RECIPIENTS

PACESETTER AWARD

The Pacesetter Award was created by NASP to recognize individual trustees or funds that have ensured or promoted the full involvement of women and minorities in the securities industry.



- | | |
|--|--|
| Henry Nicholas '96 | The Illinois State Senate '10 |
| George R. Tydings '96 | City of Atlanta General |
| District of Columbia Retirement Board '96 | Employees' Retirement Fund '11 |
| Nicholas J. Maiale '96 | California Public Employees' Retirement System '11 |
| H. Carl McCall '96 | Gregory Floyd '12 |
| Samuel Staten, Sr. '96 | Timothy Alan Simon '12 |
| Florida Board of Administration '97 | Hon. Thomas P. DiNapoli '13 |
| Ohio Bureau of Workers' Compensation '98 | Paul T. Williams, Jr. '13 |
| Prince George's County '99 | Emmett D. Carson, PhD '14 |
| State of Wisconsin Investment Board '00 | James J. Celestine, Jr. '14 |
| Major F. Riddick, Jr. '01 | Susan Taylor Batten '15 |
| Howard University '02 | Robert B. Steele '15 |
| New York City Employees' Retirement System '03 | J. Anthony Beard, CTP '16 |
| Chicago Teachers' Retirement System '04 | Donald R. White '16 |
| Los Angeles City Employees' Retirement System '05 | The Los Angeles County Employees Retirement Association (LACERA) '17 |
| Lois Jean Turner '06 | The New York State Insurance Fund (NYSIF) '17 |
| Pervis Thomas '07 | Cheryl D. Alston '18 |
| California State Teachers' Retirement System (CalSTRS) '08 | Bryan Lewis '18 |
| City of Philadelphia Board of Pensions & Retirement '08 | Daniel L. Woodall, Jr. '19 |
| The State of New York '09 | The Illinois Municipal Retirement Fund (IMRF) '19 |
| Maryland State Retirement & Pension System '09 | Renaye Manley '20 |
| Gary Grippo '10 | New York State Common Retirement Fund '21 |
| | Angela Miller-May '22 |

PAST AWARD RECIPIENTS



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TRIVERS J. BELL, JR. AWARD

The Travers J. Bell, Jr. Award was created by NASP to commemorate Travers Bell's life and legacy and institutionalize his extraordinary contributions as a national financial leader and entrepreneur. The award recognizes above average business success and has become NASP's standard for excellence, achievement and enlightened leadership in the various divisions of the finance industry.



Francisco Borges '91
Clark Burrus '92
Maynard Jackson '93
Virvus Jones '94
Maceo K. Sloan '95
Henry E. Parker '96
John W. Rogers, Jr. '97
George L. Forbes, Esq. '98
Jesse L. Jackson, Sr. '99
David N. Dinkins '00
Andrew Young '01

Willie Brown '02
Ernest G. Green '03
John H. Stroger, Jr. '04
Denise Nappier '05
Wendell Anthony '06
Alphonso E. Tindall, Jr. '07
James F. Haddon '08
William C. Thompson, Jr. '09
Emil Jones, Jr. '10
Marx L. Cazenave, II '11
McCullough Williams, III '12

Christopher J. Williams '13
Dmitri Stockton '14
Lyle Logan '15
Vicki L. Fuller '16
Les Bond '17
Thurman V. White, Jr. '18
Leona Bridges '19
Shundrawn Thomas '20
Dale Favors '21
Rodney B. Herenton '22

YOUNG PROFESSIONALS AWARD

This award will showcase the young professional who has demonstrated excellence, professional achievement and service to members of their community. The award recognizes a rising star within the NASP network who best exemplifies a commitment to, and enthusiasm for the NASP mission of support for the minorities in financial services.

Farzin Khan '21
Marques Highland '22



PAST AWARD RECIPIENTS

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MAYNARD HOLBROOK JACKSON, JR. AWARD

The Maynard Holbrook Jackson, Jr. Award (formerly the Entrepreneur of the Year Award) was established by NASP to honor the financial service professional that best exemplifies entrepreneurial achievement, community service and high moral standards.



Kneeland Youngblood '99
Susquehanna Partners '00
Christopher J. Williams '01
J. Donald Rice, Jr. '02
Paul Viera '03
Louis Holland '04
Gerald B. Smith '05
David Baker Lewis '06

Eugene J. Duffy '07
Tina Byles Williams '08
Laurence O. Gray '09
Isaac H. Green '10
Quintin E. Primo, III '11
James Reynolds, Jr. '12
Suzanne Shank '13
JoAnn H. Price '14

Eric T. McKissack, CFA '15
Herndon Capital Management (HCM) '16
Samuel A. Ramirez, Sr. '17
Nili Gilbert, CFA, CAIA '18
Andre Rice '19
Gilbert Andrew Garcia, CFA '20
David R. Jones '21
Arthur E. McClearin '22

LIFETIME ACHIEVEMENT AWARD

Established in 2012, the Lifetime Achievement Award is presented to a member of NASP, who, during his or her lifetime, has made significant achievements and contributed richly to the financial services industry. The award honors one individual who has achieved financial success, who has uncompromised integrity and dignity, and who has a strong record of philanthropic benevolence. It recognizes a man or woman who has served as a pioneer for women and people of color, has advocated for their inclusion in all areas of the financial services industry, and has set a living example that influences others to strive for excellence in the industry.



Eddie Brown, Jr. '12
Arthur E. McClearin '14

Jorge Castro, CFA '15 (posthumously)
Denise L. Nappier '18

PAST AWARD RECIPIENTS



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Independence remains steadfast in its support of individuals and community organizations dedicated to improving the lives and health of the people in our region.



Niso Abuaf

*Chief Economist and Financial Strategist,
Samuel A. Ramirez and Co.*

At Ramirez & Co., Niso is responsible for developing balance sheet management and shareholder value maximization strategies for corporates; for formulating the Firm's macroeconomic outlook; and for leading the Ramirez Investment Institute.

Niso has 40-years of Wall Street experience, having led R&D groups at Credit Suisse, Salomon Brothers/Citi, and J.P. Morgan Chase. Niso teaches (taught) at Pace, NYU's Stern, Chicago's Booth, and at Bosphorus University.

Niso has advised blue-chip corporates and sovereigns around the globe, and has played leading roles in marquee capital raising and M&A transactions; and the development of an options market in Argentina. He is fluent in French, Spanish, and Turkish; and has a working knowledge of German and Italian.

Niso received a BS and MS in Electrical and Biomedical Engineering from Northwestern University; and an MBA, and a PhD in Financial Economics from the University of Chicago. He is the author of numerous scholarly and professional publications in corporate finance, global macroeconomics, and in derivatives.



Monica Bertran

Employee Engagement Digital Platforms & Innovation, Bloomberg

Monica Bertran is the Head of Bloomberg's Employee Engagement Digital Platforms & Innovation team.

Building on a twenty-year career as an on-air anchor and reporter for Bloomberg Television and Radio, Monica developed the company's corporate communications digital and innovation team which creates content for six branded communications channels, develops employee engagement programs and heads the team that does external relations for Bloomberg's D&I and CTO and Engineering teams.

Monica's team also partners with Bloomberg's senior business leaders to develop and implement creative communications strategies targeting Bloomberg's over 20,000 employees globally.

Additionally, she serves as one of the lead presentation coaches for Bloomberg senior executives and helps develop and execute company-wide business town hall events.

Some of her standout accomplishments include the employee communications and digital strategy for Bloomberg's new London headquarters, which included website development, a documentary video series, quarterly employee town halls, employee champion program, move communications and special media events.



Monica is also very active in Bloomberg's diversity and inclusion efforts. She helped launch Bloomberg's Black Professional community and served as global co-lead of the group.

Prior to joining corporate communications, Monica held a distinguished career on Bloomberg Television and Radio. She served as an anchor for several of Bloomberg Television's programs, covering breaking financial, real estate, consumer and economic news.

Monica was also part of the initial team that worked along-side Michael Bloomberg to develop the company's media vision for the global business community and launch Bloomberg Radio- WBBR 1130AM in 1992.

Before joining Bloomberg LP, Monica worked for several major media outlets including CBS Network Radio, 1010 WINS in New York and WHDH in Boston. She began her television career in New Orleans.

Monica resides in Westchester County with her husband and son.



Euriah Bennett

*Director, Public Finance
Department, Citi*

BIO UNAVAILABLE

FEATURED SPEAKERS



Larry Bomback

*Senior Vice President & Treasurer,
Curtis Institute*

Larry Bomback serves as the Senior Vice President of Administration & Treasurer at the Curtis Institute of Music, a specialized institution of higher education and one of only a handful of colleges across the country where all students attend tuition-free. Larry ensures the financial health and regularly evaluates the business model of the college. He works very closely with the board of trustees, navigating a multifaceted governance structure with over a dozen committees and a separately incorporated foundation entity. In addition to overseeing the work of the finance and investment, strategic planning, general administration, human resources, and facilities offices, he coordinates all cross-departmental projects and initiatives and develops and nurtures important relationships with partner institutions.



Jayson Bronchetti, CFA, CAIA

*Executive Vice President, Chief Investment Officer (CIO), Head of Risk & Sustainability,
Lincoln Financial Group*

BIO UNAVAILABLE



Brenda Chia

Board Co-Chair, Association of Asian American Investment Managers

Brenda Chia is the Chief of Capital Development at Paladin Capital Group, joining the firm in 2012. She serves on the Management Team and focuses on capitalizing on growth opportunities and developing multi-faceted investor and partner relationships for deal sourcing, co-investments and exits. Brenda led the raise of the Paladin's largest fund to date, the \$372M Cyber Fund II which closed in May 2022, while building strategic relationships with top-tier corporations and investors to diversify Paladin's geographic opportunities.

One of Brenda's career highlights has been advocating for opportunities for women and minority investors. She has testified before Congress on improving participation of women and minority-owned funds in the investment industry. She is the current Board Co-Chair of The Association of Asian American Investment Managers (AAAIM), which convenes institutional capital and qualified Asian-American investors across asset classes to conduct business and build alliances. Since 2007, as the founding President, she has led AAAIM to national prominence as a DEI advocate by setting the pace, vision and fundraising for the next phase of growth, building on the network of 5,000 asset owners and managers.

Brenda has broad U.S. and international experience developing and executing business, marketing, and operational strategies for emerging and established companies. She has served as a case leader with The Boston Consulting Group and a project manager for Accenture in Asia and the U.S. Brenda has worked in Singapore, London, and Jakarta.

Brenda holds a B.S. degree in computer science, graduating at the top of her class with first class honors from National University of Singapore, and an MBA from the Harvard Business School. She is fluent in Cantonese, Mandarin, and Bahasa Indonesia.

FEATURED SPEAKERS



Benjamin Cotton

Chief Investment Officer, Pennsylvania Public Schools Employee Retirement System

Benjamin L. Cotton, Ed.D., CFA: Dr. Cotton (“Ben”) presently serves as the Chief Investment Officer for the Public School Employee’s Retirement System (“PSERS”), Pennsylvania. He brings over 25 years of prior experience in investment, treasury, and internal control experiences serving with the UAW Retiree Medical Benefits Trust, and Ford Motor Company.

Cristian deRitis

Deputy Senior Economist, Moody’s Analytics

Cris deRitis is the Deputy Chief Economist at Moody’s Analytics where he specializes in the analysis of current and future economic conditions, housing markets, and consumer credit. He publishes his analysis regularly and is often quoted in publications such as the Wall Street Journal for his views on the economy. Before joining Moody’s Analytics, Cris worked for Fannie Mae where he developed default, prepayment, and loss severity models for mortgage portfolios. He holds a PhD in economics from Johns Hopkins University and is a Certified Business Economist. In addition to his published research, Cris is named on two U.S. patents for credit modeling techniques.



Andre Dickens

Mayor, City of Atlanta

Andre Dickens is the 61st Mayor of Atlanta. A proud native of Atlanta and a product of Atlanta Public Schools, Mayor Dickens is focused on bringing opportunity and equity to the city that he loves.



Mayor Dickens’ agenda is rooted in Moving Atlanta Forward, through improving public safety, increasing opportunities for the city’s young people, empowering neighborhoods, and investing in housing and combatting homelessness, all while fostering a culture of integrity in the City. As he shared in his first State of the City address, his vision for Atlanta is:

One city with one bright future. A city of safe, healthy, connected neighborhoods with an expansive culture of equity, empowering upward mobility and full participation for all residents, embracing youth development, and an innovative, dependable government moving Atlanta forward, together.

Mayor Dickens was sworn in as Mayor in January 2022. Early accomplishments include making the City’s first-ever investment in early childhood education; the establishment of the Nightlife Division to address establishments with a history of high crime; the reestablishment of the Pothole Posse to rapidly respond to residents’ reports; and leading the successful coalition to keep Atlanta whole in opposition to a de-annexation effort.

Prior to his election as Mayor, Dickens served eight years as an at-large City Council member. He was an entrepreneur for over a decade in both the private and nonprofit sectors and a leader in Atlanta’s tech sector. Mayor Dickens is a graduate of Mays High School and holds a bachelor’s degree in chemical engineering from the Georgia Institute of Technology as well as a Master of Public Administration from Georgia State University.

Mayor Dickens enjoys spending time with his daughter, experiencing live music, attending church services, and traveling the world. He is an avid supporter of all of Atlanta’s sports teams.

FEATURED SPEAKERS



Orlando Esposito

Chief Financial Officer, Philadelphia Foundation

Orlando C. Esposito joined the Philadelphia Foundation as Chief Financial Officer in April 2019.

Prior to joining the Philadelphia Foundation, he served as Executive Vice President (EVP) and Head of PNC's Asset Management Group and previously as EVP of its Corporate Banking Group. In these two roles, he led PNC's efforts in the growth of wealth management, institutional investments and ultra-high net worth business segments, as well as establishing relationships with corporate finance and middle market clients in multiple industries across the mid-Atlantic region.

Before joining the financial services field, he was an auditor with Deloitte, which provides audit, financial advisory, tax and consulting services to its clients.

He has deep roots within the Philadelphia area having grown up in the Kensington neighborhood. He graduated from Central High School and went on to earn a BA in Accounting from Philadelphia University and an MBA from Villanova.

Esposito is active on the boards of TouchPoint Inc, the Philadelphia Museum of Art, and the Regional Foundation.

He has served on the executive committee of the United Way of Greater Philadelphia and Southern New Jersey and led its 2017-18 campaign. In the past he has also been on the boards of both the Philadelphia Zoo and Thomas Jefferson University where he remains an adjunct professor of finance.



Kimberly Evans

Head of Corporate Sustainability, Inclusion, and Social Impact, Northern Trust

Kimberly Evans, is an Executive Vice President at Northern Trust. Reporting directly to the CEO of Northern Trust, she is the Head of

Corporate Sustainability, Inclusion and Social Impact for the firm. This role is responsible for developing the enterprise strategies for ESG, Diversity, Equity & Inclusion, and Community Development & Investing.

Prior to this role, she led the growth of the North America Private Capital Fund Services business, previously managed the Governmental, Sovereign Wealth, and Taft Hartley/Union pension and treasury business, in the US, Central and South America, and was responsible for the Global Client Accounting Practice serving the data delivery and reporting needs of the firm's institutional and wealth clients.

With over 25 years of experience, Kim has become a business transformation expert. Kim has developed, led, and executed business and change strategies for five financial services companies, managed teams in six countries, and has implemented institutional programs impacting thousands of financial services professionals throughout her career. She has also owned and operated businesses as an independent consultant and as a franchise owner.

Kim graduated from the University of Illinois at Urbana-Champaign with a Bachelor of Science in Psychology and has earned numerous business, leadership, and technical certifications throughout her career.

Kim was recognized by Savoy Magazine in 2022 as one of the Most Influential Black Executives in Corporate America, named one of the Iconic 22 from Delta Sigma Theta Sorority, Inc. – Chicago Metropolitan Alumnae Chapter, named a 2021 Leader That Can from Schools That Can, one of the 50 Leading Women in the 2020 Hedge Fund Journal, a Chicago United 2019 Business Leader of Color Honoree, is a Leading Women's Executive Alumni, and a three-time Chairman's Award recipient. She was also recognized as a Leader in Philanthropy by the University of Chicago and currently serves on the board of the Chicago Public Education Fund (The Fund) which targets the development of principals within Chicago Public Schools (CPS). She also serves on the boards of the Chicago Urban League and the Chicago State Foundation. She is a distinctive member of C200, a powerful community of successful businesswomen and the Economic Club of Chicago.

Shawna Ferguson

Director of Global Diversity, Equity & Inclusion, Wellington Management

As a partner and the senior managing director of global diversity, equity, and inclusion (GDEI), Shawna directs the firm's global strategy with measurable goals as a fully integrated part of Wellington Management's talent ecosystem including practices, programs, and processes. She partners with business leaders, committees, human resources, and employees to develop customized business-led plans that strengthen the firm's ability to attract, develop, and retain exceptional talent. Shawna leads the firm's GDEI Team responsible for consulting and collaborating on DEI best practices, action plans, outcomes, accountability, communications, and impact. The team leverages an innovative approach including creating differentiated solutions, best practice programming, advising on DEI education and development offerings, and partnering with external DEI industry coalitions. She also provides consultation with clients and vendors globally to enable their DEI approach.

Shawna serves on the firm's regional DEI Committees and is a member of the Americas Compensation & Talent Committee. She earned an MEd, with a specialization in adult and organizational learning, from Northeastern University and a BS in management from Lesley University. She received a Certified Cornell Diversity Professional/Advanced Practitioner (CCDP/AP) designation from Cornell University and was previously an adjunct instructor for the University's Industrial Labor Relations School. She is a certified professional diversity coach (CPDC) from Coach Diversity Institute and Howard University. Shawna is a 2004 Fellow and 2016 Next Generation Executive Alumna from The Partnership, Inc. leadership development program. She serves on the National Association of Securities Professionals (NASP) Advisory Board and received the 2021 NASP Joyce Johnson Award. In 2018, Shawna received the Frank X. McCarthy Diversity Champion Award from the Northeast Human Resources Association.



Samantha Grant, CFA, CAIA

Senior Consultant, Verus Investments

Ms. Grant is primarily responsible for providing a broad range of consulting services to a variety of institutional plan sponsors, including strategic asset allocation, manager structure analysis, manager selection, risk management and continuing education of fiduciaries.

Prior to joining Verus, Ms. Grant served as an investment consultant at Marquette Associates where she was a member of the firm's investment committee, traditional investment manager search committee, and sustainable investing committee. In addition, Ms. Grant led U.S. equities manager due diligence at Marquette Associates and developed the manager due diligence platform for Mesirow Financial's Retirement Advisory Services group. Ms. Grant began her career at Northern Trust in a leadership development program before transitioning to a portfolio manager role on a quantitative equity team.

Ms. Grant holds a master's degree in business administration (MBA) and a bachelor of science (BS) from Florida A&M University. She is also a Chartered Financial Analyst (CFA) charterholder and a Chartered Alternative Investment Analyst (CAIA) charterholder. Ms. Grant's community involvement includes serving on the board of the South Side YMCA of Metro Chicago.

FEATURED SPEAKERS



Derek Green

Of Counsel, Obermayer Rebmann Maxwell & Hippel, LLP

In 2015, Derek S. Green, Esquire won the Democratic primary for City Council At-Large in Philadelphia by receiving the highest number of votes cast in the election, and, later that year, he was elected as a member of City Council. In 2019, he was elected for another term. On September 6, 2022, Derek resigned from City Council to run for Mayor of Philadelphia.

Currently, Derek serves as Of Counsel at the law firm of Obermayer Rebmann Maxwell & Hippel, LLP. Additionally, he serves as Special Counsel at Bellevue Strategies, a full-service government relations and advocacy communications firm.

As a member of Council, he chaired the Committees on Finance and Disabilities and served as the Vice Chair of the Committees on Aging and Law and Government. Additionally, Councilmember Green served as the Chair of the Philadelphia Gas Commission, President of the Democratic Municipal Officials, and President of the Pennsylvania Municipal League. Additionally, he served on the Boards of the Philadelphia Cultural Fund and National Black Caucus of Local Elected Officials. Further, he served on the Executive Committees of the Democratic National Committee and National League of Cities. Additionally, he serves on the Boards of the City Trusts, Girard College, and Philadelphia Convention & Visitors Bureau.

Before his election, Derek Green was the Special Counsel to Councilmember Marian B. Tasco. In this capacity, he drafted legislation as well as reviewed and monitored local, state, and federal legislation. He also served as counsel to the Philadelphia Gas Commission and the Committees on Finance and Public Health and Human Services and managed various Council hearings and meetings with constituents and executives.

Prior to working in City Council, Derek Green served as a Deputy City Solicitor in the Housing and Community Development Division of the Corporate Group of the City's Law Department. As a Deputy City Solicitor, he represented the Offices of Housing and Community Development and Neighborhood Transformation Initiatives, Commerce Department, and Vacant Property Review Committee and annually drafted, negotiated, and reviewed over \$100 million in housing and economic development contracts funded by the City, PA Department of Community and Economic Development, and U.S. Department of Housing and Urban Development.

Additionally, Derek's legal experience includes positions as an Assistant District Attorney in Philadelphia and Assistant Deputy

Attorney General for the State of Delaware (Securities and Criminal Divisions). He is admitted to practice law in the Commonwealth of Pennsylvania and State of New Jersey. He is also a graduate of the University of Virginia and Temple University School of Law and is a member of the Center for Progressive Leadership's

inaugural class of Political Leadership Fellows, and served as a faculty member and alumni Board Director. Furthermore, the Pennsylvania Law Weekly named Derek as a Lawyer on the Fast Track, Cheyney University honored him with the President's Outstanding Community Leader Award, Community College of Philadelphia presented him with their Distinguished Leadership Award, Democratic Municipal Officials awarded him with their President's Award, Urban Education Fund honored him with the Gimper Award for Outstanding Service, Bensalem High School honored him with its first Distinguished Alumni Award, Leadership Philadelphia selected him as one of the region's key connectors and leaders, Metro Philadelphia selected him as one of 6 new young political leaders, the Philadelphia Daily News named him one of the 10 under 40 rising political stars, and City and State PA named him to their Philly Power 100 list. In 2018, he was selected as NewDEAL Leader.

Before becoming an attorney, Derek Green was a consumer and small business lender for Meridian Bank. He also served in a leadership capacity in a number of civic and professional organizations including President of the Center in the Park, Inc. and East Mount Airy Neighbors, Inc. ("EMAN"), First Vice President of the Germantown YMCA, Vice President of Young America Political Action Committee, Co-Vice Chair of the PA Bar Assoc.'s Legal Services to the Public Committee. Further, he served as a Board Director for the Green Tree School, Mt. Airy USA CDC, Urban League of Philadelphia, West Oak Lane Charter School, West Philadelphia YMCA, and served as pro bono counsel for the Family Life Centers of Canaan Baptist Church and Salem Baptist Church of Jenkintown.

Derek Green and his wife, Sheila, co-founded the first Autism Support Class at Houston Elementary School to help other Autistic children like their son. To aid other families affected by Autism, they are a top regional fundraiser for Autism Speaks.



FEATURED SPEAKERS



Carla Harris

Senior Client Advisor & Managing Director, Morgan Stanley

Carla was most recently a Vice Chairman responsible for increasing client connectivity and penetration to enhance revenue generation across the firm. She was the founder and creator of the award winning, Multicultural Innovation Lab at Morgan Stanley, and the award winning podcast, Access and Opportunity. She formerly headed the Emerging Manager Platform, the equity capital markets effort for the consumer and retail industries and was responsible for Equity Private Placements. In her 30+ year career, Ms. Harris has had extensive industry experiences in the technology, media, retail, telecommunications, transportation, industrial, and healthcare sectors. In August 2013, Carla Harris was appointed by President Barack Obama to chair the National Women's Business Council.

For more than a decade, Ms. Harris was a senior member of the equity syndicate desk and executed such transactions as initial public offerings for UPS, Martha Stewart Living Omnimedia, Ariba, Redback, the General Motors sub-IPO of Delphi Automotive, and the \$3.2 Billion common stock transaction for Immunex Corporation, one of the largest biotechnology common stock transactions in U.S. history. Ms. Harris was named to Fortune Magazine's list of "The 50 Most Powerful Black Executives in Corporate America", Fortune's Most Influential List, U. S. Bankers Top 25 Most Powerful Women in Finance (2009, 2010, 2011), Black Enterprise's Top 75 Most Powerful Women in Business (2017), and "Top 75 African Americans on Wall Street", and to Essence Magazine's list of "The 50 Women Who are Shaping the World", Ebony's list of the Power 100 and "15 Corporate Women at the Top" and was named "Woman of the Year 2004" by the Harvard Black Men's Forum and in 2011 by the Yale Black Men's Forum.

Prior to joining Morgan Stanley, Carla received an MBA, Second Year Honors from Harvard Business School and an AB in economics from Harvard University, Magna Cum Laude. Carla has also received Honorary Doctorates of Laws, Humanities and Business from Marymount Manhattan College, Bloomfield College, Converse College, Jacksonville University, Simmons College, the College of New Rochelle, St. Thomas Aquinas College, Babson College and Fisk University, Wake Forest University and Felician University respectively. Carla Harris is actively involved in her community and heartily believes that "we are blessed so that we can be a blessing to someone else."

She is the past Chair of the Board of the Morgan Stanley Foundation and of The Executive Leadership Council, and sits on the boards of Sponsors for Educational Opportunity (SEO), The Sesame Workshop, Mother Cabrini Health Foundation and is an active member of the St. Charles Gospelites of the St. Charles Borromeo Catholic Church and the Mark Howell Singers. She is a member of the board of overseers of Harvard University and of the board of directors of the Walmart Corporation, Cummins Corporation and MetLife. Ms. Harris was co-chair of the National Social Action Commission of Delta Sigma Theta Sorority, Incorporated. She has been named to the New Jersey Hall of Fame (2015) and has received the Bert King Award from the Harvard Business School African American Alumni Association, the 2005 Women's Professional Achievement Award from Harvard University, the Pierre Toussaint Medallion from the Office of Black Ministry of the Archdiocese of New York, the Women of Power Award given by the National Urban League, the Women of Influence Award from The Links, Incorporated and many other awards. In her other life, Carla is a singer who has sold out concerts at Carnegie Hall and the Apollo Theatre, and released 4 Gospel CDs: "O This is Christmas" (2021) "Unceasing Praise" (2011), "Joy Is Waiting" (2005), and her first CD entitled, "Carla's First Christmas" (2000), was a bestseller on Amazon.com in New York and was featured on the CBS Evening News with Dan Rather in his "American Dream" segment. She is also an internationally renowned public speaker and the author of the books, Strategize to Win (2014), Expect to Win (2009) (Hudson Press) and of Lead To Win (2022).

FEATURED SPEAKERS



Robert Greene

President and CEO, National Association of Investment Companies

Robert L. Greene is President & CEO of the National Association of Investment Companies (NAIC), the industry association representing diverse-owned alternative investment firms. Bob is responsible for leading all facets of the association including capital and policy advocacy, performance research, member services, and strategic alliance development.

Bob is the former Chairman of the Board of Trustees for the Virginia Retirement System (VRS), an \$85 billion public pension plan which administers a defined benefit plan, a defined contribution plan and a variety of other retirement benefits for over 600,000 state employees. During his tenure Bob led a number of committees of the board including the Audit & Compliance Committee, Administration & Personnel Committee, and Investment Policy Committee.

Previously, Bob was Director of Private Equity with Arthur Andersen's Transaction Advisory Services Practice where he provided due diligence and other advisory services to some of the largest private equity firms in the nation like Allied Capital, Texas Pacific Group and The Carlyle Group.

Bob is widely regarded as a thought leader in entrepreneurship, finance and diversity & inclusion. He was recognized in The Root 100 list of prominent business leaders and is a frequent speaker for the Sovereign Wealth Fund Institute, Pension Bridge, NMSDC, Robert Toigo Foundation and the Executive Leadership Council.

Bob received a Bachelor of Science Degree in Economics from Virginia Commonwealth University (VCU), in Richmond, Virginia. Bob holds lifetime memberships in Kappa Alpha Psi Fraternity Inc., the National Eagle Scout Association, and the National INROADS Alumni Association.



Anyori Hernandez

President and CEO, New America Alliance

BIO UNAVAILABLE

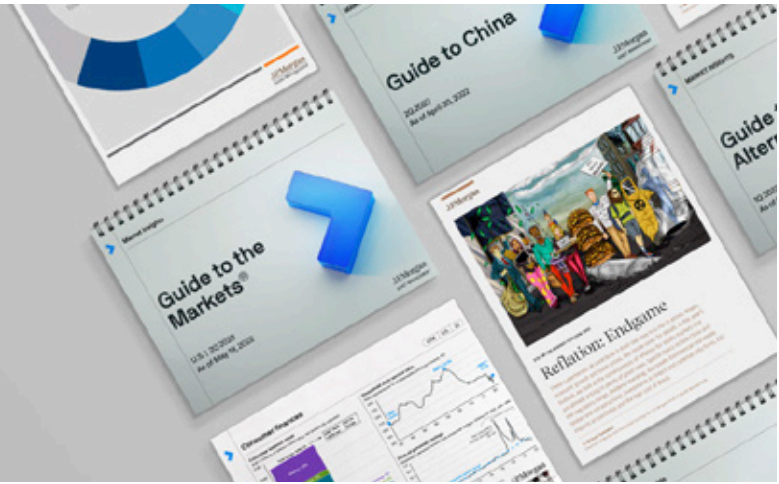
David Holmgren

Former Chief Investment Officer, Hartford Healthcare

David until recently was Chief Investment Officer of \$5B nonprofit Hartford HealthCare that achieved 1% performance ranking in the Endowment and Foundation peer universe. At HHC, David had lead responsibility for the hospitals' investment portfolios, which include risk management, portfolio construction, asset allocation, manager selection, and investment operations. David currently serves on the Investment Committee for the Hartford Public Foundation. Previously, he served as the Principal Investment Officer for the Connecticut State Treasury and prior was a Senior Portfolio Manager at DSI/UBS. David has 35 years of investment experience in the US, Europe, and Middle East covering traditional and alternative investment management. He received his BA from Denison University MBA from Columbia University. In 2022, Institutional Investor named David CIO of the Year for Advocacy and Chief Investment Officer named David CIO of the Year for Diversity & Diversification.



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I am honored to join Eugene J. Duffy, Mesirow managing director and former NASP chair, in expressing our appreciation for the organization's long-term commitment to diversity, equity and inclusion in financial services.

We are proud to partner with NASP and other organizations that advocate and pave the way for talented women and professionals of color.

At Mesirow, we know that our ability to serve clients globally depends on the dynamic evolution of a culture that prizes diverse thought and experience.

Natalie A. Brown | CEO

mesirow.com

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FEATURED SPEAKERS



DeAnna Ingram Jones

Consultant, NEPC

DeAnna joined NEPC as a Consulting Analyst in 2015, she was promoted to her current role of Senior Consulting Specialist in 2019 and she is a part of NEPC's Chicago office. In her current role, DeAnna is responsible for managing day to day client servicing and overseeing client deliverables, including asset allocation studies, investment manager searches, portfolio rebalancing. In addition to her roles on client team, she is also a member of NEPC's Diverse Manager and Asset Allocation Committees.



Prior to joining NEPC, DeAnna was the Vice President of Community Investments for BMO Harris Bank, where she managed the bank's Community Reinvestment Act portfolio, which primarily consisted of real estate and private debt investments. She also held roles at RVK, Inc and Chicago Teachers' Pension Fund.

DeAnna earned her B.S. in Economics from the Northern Illinois University. She serves as the Chair of the Investment Committee for TASC, Inc and is the President of the Chicago Chapter of the National Association of Securities Professionals ("NASP").

Anthony K. Johnson

Director of Midwest Consulting, Senior Consultant, Principal, RVK, Inc.

Located in our Chicago office, Anthony (Tony) serves as RVK's Director of Midwest Consulting and as a Senior Consultant. He joined the firm in 2008 and has over 25 years of industry experience. In addition to his consulting responsibilities, Tony leads the general consulting operations in the Chicago office.



His experience prior to RVK includes oversight of the City of Philadelphia's then-\$4 billion Public Employees Retirement System and Deferred Compensation Program, where he served as the Chief Investment Officer for over four years.

During his career, Tony served as a Senior Consultant with Franklin Park Associates researching and providing consulting services to institutional investors on private equity partnerships. He also served as an investment consultant with Mercer on corporate and healthcare investment plans serviced from the Philadelphia and New York offices. Tony started his career as a risk analyst with an insurance brokerage firm.

Tony earned his BS degree in Business Administration with dual majors in Finance and Risk Management & Insurance, with honors, from Temple University in Philadelphia. Tony is a shareholder of the firm and a member of the Board of Directors.

Polo Leteka Radebe

President, Association of Black Securities and Investment Professionals, ABSIP

Polo Leteka is a highly accomplished and experienced entrepreneur and private equity investor. She is the Chairman and Founder of IDF Capital - a South African based entrepreneurial financier and advisory firm. Through IDF Capital, Polo has contributed towards changing investments into women owned SMEs across South Africa. In 2015, she co-founded AlithealDF to continue investing in high growth businesses across Sub-Saharan Africa that are women owned and led.

Polo is an accountant by training, and has varied experience in both the Public and Private sectors of South Africa which includes accounting and auditing, corporate finance, investment banking, public policy formulation, venture capital and private equity in the SME sector. At a fairly young age, Polo was tasked with leading the process of developing South Africa's first ever Codes of Good Practice on Broad-Based Black Economic Empowerment which is a Government policy seeking to transform the South African economic landscape to be more reflective of its population demographics. As a result of this ground breaking work which has changed how Corporate South Africa interacts with the rest of the economy, she is considered a thought leader in areas of economic transformation and development.

Polo is an accomplished public speaker, contributor to thought leadership articles on transformation and entrepreneurship. She was also part of South Africa's version of the Dragons Den show and is also a co-Author of a book called ".....and for all these reasons, I'M IN.....", which seeks to assist entrepreneurs to become investor ready.

Polo is the current President of Association of Black Securities and Investment Professional (ABSIP).



FEATURED SPEAKERS



Raynald Leveque

Chief Investment Officer, New Hampshire Retirement System

BIO UNAVAILABLE



Reta Jo Lewis

President and Chair, Board of Directors, Export, Import Bank of the United States

BIO UNAVAILABLE

Shawn Lytle

Senior Managing Director, Head of Public Investments, Macquarie Asset Management, Head of Americas - Macquarie Group

· Joined Macquarie in 2015

· Based in Philadelphia

Shawn leads Public Investments for Macquarie Asset Management (MAM), where he is responsible for the Equities, Fixed Income, and Multi-Asset businesses. He also serves as the President of Delaware Funds by Macquarie® and Head of Americas for Macquarie Group.

He has more than 30 years of experience. Before joining MAM, he held several management and equity investment roles at UBS Asset Management and various roles at J.P. Morgan Asset Management.

Shawn is a member of the Investment Company Institute Executive Committee. He is also a board member of OppNet and Philadelphia Financial Scholars, in addition to being the former Chairman of the National Association of Securities Professionals.

He received a Bachelor of Science in marketing from The McDonough School of Business at Georgetown University.



Guy T. Logan

Managing Director, Head of National Infrastructure, Raymond James & Associates, Inc.

Mr. Logan is the Immediate Past Chairman of NASP and has served on the NASP Board of Directors since 2013. Mr. Logan is Managing Director, and Head of the National Infrastructure Group, within Raymond James' Public Finance Municipal Investment Banking department, and he is responsible for delivering investment banking services to municipal issuers throughout the United States. Mr. Logan has worked on over 250 transactions more than \$50 billion for a wide variety of credit structures that include: general obligation, transportation, water and sewer, tax backed, revenue bonds, certificates of participation/lease purchase transactions, higher education, health care, limited tax, airports, and contractual obligation bonds.



Angelo Manioudakis

Executive Vice President & CIO, Northern Trust

Angelo Manioudakis is chief investment officer for Northern Trust Asset Management, responsible for investment performance, process and philosophy for more than \$1 trillion in assets. He also chairs the Investment Policy Committee, which guides strategic and tactical asset allocation for Northern Trust portfolios.

Angelo oversees the equity, fixed income, asset allocation and alternative investment teams globally, with a focus on seeking to deliver investment strategies that compensate investors for the risks they take in all market environments.

Prior to joining Northern Trust in 2021, Angelo held leadership roles at multiple global investment firms, spanning more than three decades in the investment industry. As chief investment officer for Fidelity Investments' Global Asset Allocation Division, Angelo oversaw improvements in investment performance and asset growth across approximately \$500 billion in assets. More recently, he co-founded Lantern Harbor Investment Partners, a Boston-based alternatives investment firm. He also led investment teams for public fixed income and derivatives at Sun Life Financial and institutional fixed income at Oppenheimerfunds.

Extending his passion for investing to community service, Angelo chairs the endowment investment committee, and serves as a trustee, at the American College of Greece. Angelo also serves as a board member for the Chicago Council on Global Affairs.

He earned an MBA from Harvard Business School and a bachelor's degree in finance from Bentley College.



Johnathan Medina

Managing Director, Head of Diversity, Equity, and Inclusion, Macquarie Asset Management

- Joined Macquarie in 2013
- Based in New York

Johnathan is the Head of Diversity, Equity, and Inclusion (DEI) for Macquarie Asset Management (MAM). In this role, he is responsible for fostering inclusion and bolstering diversity across MAM. He partners with our portfolio companies to embed DEI as a business imperative so that it becomes a competitive advantage.

Prior to this role, Johnathan was the Head of DEI at Apax Partners. Prior to that, he was a Partner within Accenture's Strategy Practice, where he advised Fortune 500 companies and their C-Suites on large-scale business transformation and co-founded the DEI practice.

He serves on the board of the 30 Percent Coalition and Toigo Foundation.

Johnathan holds a Master of Business Administration in strategic management and marketing and a Master of Arts in international studies from The Wharton School of the University of Pennsylvania. He holds a Bachelor of Business Administration in international management from Pace University. He is a proud alum of ALPFA, INROADS, SEO, MLT, and the Robert Toigo Foundation.

FEATURED SPEAKERS



Erica Y. Miles, MBA

*Senior Lead Diversity and Inclusion Consultant,
SVP Diverse Segments, Representation and Inclusion,
Wells Fargo*

Erica is a thought leader and expert in the areas of diversity and inclusion, economic justice, and community development. She currently serves as a Senior Consultant at Wells Fargo Bank, building national relationships with diverse businesses and communities and advising on the bank's company-wide diversity, equity and inclusion initiatives. Prior to joining Wells, Erica served as the Director of Diversity and Inclusion for the U.S. House Committee on Financial Services, leading work for the Congress' first ever Subcommittee on Diversity and Inclusion. Before her time on Capitol Hill, she was a Senior Analyst at the U.S. Government Accountability Office, where she led and contributed to various reviews of the financial market and housing sectors including nonbank mortgage servicing, access to banking services in border Southwest communities and homeless assistance. Prior to that, she supervised credit and collections departments for regional and large national banks. In addition to roles as a diversity and inclusion training facilitator, Erica is a member of the newly formed Diversity, Equity and Inclusion Advisory Committee at the University of Kentucky's Gatton College of Business and Economics, where she also received her MBA in 2001. Erica's hometown is Memphis, Tennessee, where she completed her undergraduate degree in Political Science at the University of Memphis. As a current resident in Washington D.C., she is a Commissioner on the mayor's Financial Services Regulatory Sandbox and Innovation Council that advises D.C. government on ways to attract and promote FinTech innovation in their community. Erica is a proud member of Alpha Kappa Alpha Sorority, Inc.



Michael Miller

*Chief Investment Officer,
Crewcial Partners*

BIO UNAVAILABLE

Simona Mocuta

Chief Economist, State Street Global Advisors

Simona Mocuta is the Chief Economist of State Street Global Advisors. In this role, she helps shape the team's views on key global economic developments and trends, produces forecasts and analysis for the G7 economies and key emerging markets, and presents these views to internal investment teams, clients, and the media. She is the lead author of the Weekly Economic Perspectives, produces thought leadership articles on a wide range of macroeconomic topics, and is a regular speaker at financial industry events. Simona is the current chair of the Economic Advisory Committee of the American Bankers Association.

Prior to joining State Street, Simona led the Asia macroeconomic practice at IHS Global Insight, where she oversaw the team's long-term economic forecasts and risk assessments for Asian countries and led the enhancement of the China Regional Economic Service.

Simona holds a Master's degree in International Economics from Suffolk University in Boston, MA, and an undergraduate degree in International Economic Relations from West University of Timisoara, Romania.



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FEATURED SPEAKERS



Christian Nwasike, MFP, MBA

Chairman, Board of Directors, Association of African American Financial Advisors

Christian is a dynamic sales executive and entrepreneur with a proven track record of success in driving growth and innovation in the financial services industry. As the founder and managing partner of Practice Management Consultants LLC (PMC-LLC), Christian serves as the Principal Consultant & Executive Managing Partner, bringing his passion, creativity, and deep subject matter expertise to every client engagement.

At PMC-LLC, Christian is dedicated to expanding Diversity, Equity, Belonging & Inclusion (#debi) in the retail wealth management industry, partnering with firms seeking a competitive edge in acquiring retail clients and advisors, and leveraging diverse sales forces.

One of Christian's proudest achievements is the creation of an award-winning Supplemental Professional Development Coaching and Training (SPDC&T) program called "The KoyaSM System". This program is designed exclusively for Black and African American Financial Advisors (FA) and integrates sales, communications, and leadership training with the four quadrants of retail wealth management - banking, asset management, estate planning, and risk management. Through "The KoyaSM System", Christian is dedicated to helping B/AA Financial Advisors become the best versions of themselves possible.

In addition to his work at PMC-LLC, Christian is a member of several boards and organizations, including the Forbes Coaches Council, the Chairman of the Board of Directors at The Association of African American Financial Advisors (AAAA), a National Advisory Council Member at the National Association of Securities Professionals (NASP), a Former Member of the Board of Directors at the Association of Black Estate Planning Professionals (ABEPP), a Member of the Board of Directors at The African Gifted Foundation, and a retained Consultant to the Association for Wholesaling Diversity (AWD).

Overall, Christian brings a wealth of experience and expertise to the wealth management industry and is a dedicated champion of diversity, equity, belonging, and inclusion.



Ronald C. Parker

President and CEO, National Association of Securities Professionals (NASP)

Ronald C. Parker is the former President/CEO of The Executive Leadership Council (ELC), an organization representing global black CEOs, senior executives and corporate board members of Fortune 1000 and global 500 organizations.

During his tenure as President/CEO, the organization achieved outstanding growth in several strategic areas including membership, corporate partnership, and program development. He is most noted for the creation of the NextGen CEO Academy, powered by Deloitte; the creation of the C-Suite Academy, developed in partnership with McKinsey; and for guiding the Corporate Board Initiative, yielding a significant increase in the number of black executives serving on the boards of Fortune 1000 companies. Also, Parker has contributed to numerous leadership development programs targeted towards the growth of the mid-level global talent pipeline.

Prior to The ELC, Parker was with PepsiCo for nearly 30 years and retired from his position as Senior Vice President of Human Resources, Labor Relations and Global Diversity & Inclusion. During his time at PepsiCo, Parker served in a number of positions across multiple functions including field operating and corporate staff roles.

Currently, Parker serves on the Board of The Association of Governing Boards of Universities and Colleges (AGB), the Board of Baylor Scott & White Hospital, the Diversity & Inclusion Advisory Board of Procter & Gamble, the Board of Visitors for Howard University's School of Business, the United Way Foundation of Metropolitan Dallas Board, and is a former Board Member of the Executive Leadership Council.

Parker is a graduate of Texas Christian University (TCU), holding a B.A. in Political Science. He also serves on the Board of Trustees for TCU, serves as Chair of the University's Development Committee, and is on the Board of Advisors for TCU's Neely School of Business. Parker is an National Association of Corporate Directors Board Fellow and a frequent speaker on governance, diversity & inclusion, and leadership matters.





Sebastien Page
*Head of Global Multi-Asset
 and Chief Investment
 Officer, T. Rowe Price*

BIO UNAVAILABLE

Avery Robinson, CAIA

*Senior Vice President, Real Assets Consulting Group,
 Callan LLC*

Avery A. Robinson, CAIA, is a senior vice president and co-manager of Callan’s Real Assets Consulting group. He has overall responsibility for real assets consulting services, and oversees research and implementation of real estate, timber, infrastructure, and agricultural asset classes. He also oversees all investment due diligence for real assets and is a member of Callan’s Diversity & Inclusion Committee. He is responsible for strategic planning, implementation, and performance oversight of plan sponsor clients’ real assets portfolios. Avery heads research coverage for core open-end funds and emerging managers. He is a member of Callan’s Management Committee and Inclusion Committee. He is a shareholder of the firm.

Before joining Callan in 2008, he was employed with the Principal Global Investors as an asset manager.

Avery received his MBA and BS in engineering from the University of Iowa and has earned the right to use the Chartered Alternative Investment Analyst designation.



Steven Reed

Mayor, Montgomery, Alabama

Steven L. Reed was sworn in November 2019 as the 57th Mayor of the City of Montgomery, Alabama, a historic destination known globally as The Birthplace of the Civil Rights Movement. Mayor Reed is the first African American to hold the position.



A native of Montgomery, Mayor Reed is committed to realizing his vision of a more equitable, progressive, and compassionate city. To that end, he is advancing an agenda that addresses the community’s most pressing issues and puts Montgomery on track to become a leader in the New South.

Mayor Reed led the effort to increase funding for Montgomery’s public schools for the first time in nearly 30 years. In doing so, he organized a cross-community, broad, and diverse coalition of supporters, including faith and business leaders to educators, activists, and parents. This support was crucial to more adequately invest in education and ensure a brighter future for Montgomery.

As a lifelong public servant and leader, Mayor Reed previously served as Montgomery County, Alabama’s first African-American and youngest elected Probate Judge. He expanded mental health services to some of Montgomery’s most vulnerable residents, improved the facilities of the Probate Court, and modernized the office to better serve the community. As Probate Judge, Mayor Reed served on the Department of Homeland Security’s Election Integrity Commission and initiated a statewide campaign to educate the public about new Voter ID laws. Even from this position, Mayor Reed led; he was the first probate judge in the state to grant same-sex marriage licenses following the Supreme Court ruling.

In his first year in office, Mayor Reed successfully led Montgomery through the once-in-a-lifetime pandemic that impacted all aspects of life. Amid the height of the COVID-19 pandemic and its sweeping effects on public and private sector budgets, Mayor Reed restructured the city government to increase efficiency and effectiveness while ensuring the City maintained a balanced budget without having to touch reserves, borrow money or initiate layoffs. As a result, bond rating agencies awarded Montgomery its best grades since the Great Recession.



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FEATURED SPEAKERS



Fatima Shama

Head of Diversity and Inclusion, Americas, Bloomberg

Fatima Shama is the head of diversity and inclusion (D&I) for the Americas at Bloomberg. Fatima oversees the diversity, equity and inclusion strategy and delivers programs and initiatives that advance diverse representation and drive change across the organization.

Fatima and her team bring inclusive and equitable practices that enhance culture, the workplace and overall business excellence through accountability frameworks, talent management strategies, programming and partnerships.

Over the last 25 years, Fatima has worked on innovative strategies that respond to the needs of diverse communities at the intersection of health care access, educational equity, youth development and advocating and supporting immigrants and communities of color. Her work has focused on engaging, lifting and supporting diverse talents, voices and perspectives to ensure inclusive and equitable opportunities and outcomes.

Prior to joining Bloomberg, Fatima was the CEO and executive director of The Fresh Air Fund. Before that, Fatima served in Mayor Michael R. Bloomberg's administration as the commissioner of the NYC Mayor's Office of Immigrant Affairs and his senior policy advisor on education.

Fatima serves as a Trustee for the Pinkerton Foundation and is on the boards of the New York Immigration Coalition, Coro Leadership New York and National Summer Learning Association.

She earned her Executive Master of Public Administration at Baruch College.



Frank Scott

Mayor, Little Rock, Arkansas

Frank Scott, Jr. began his second four-year term as Mayor of Little Rock on Jan. 1, 2023. Mayor Scott is the City's 73rd Mayor and is Little Rock's first-ever popularly-elected African American mayor.



During his time in office, Mayor Scott has worked toward uniting Little Rock's diverse neighborhoods through expanding our economy, creating new opportunities for educational growth for Little Rock's students, enhancing public safety and improving the quality of life and place in Arkansas' capital city.

Mayor Scott has pledged to be Little Rock's Chief Growth Officer, and has overseen the creation of more than 8000 jobs to date. Little Rock's population has grown to more than 203,000 residents as the Mayor pushes jobs growth and economic development, making Little Rock a catalyst for the new South. New developments, such as Trex, Amazon, Trader Joe's, Fiocchi, Topgolf and more highlight the momentum of this growing and thriving city.

Under the Mayor's leadership, the City established the position of Chief Education Officer and helped implement a Community Schools model in six Little Rock School District schools. These schools integrate individualized student support services, expand and enrich learning opportunities, and operate as a neighborhood hub to provide other needed trainings and services for students' families.

Mayor Scott worked with the Little Rock Board of Directors to make the Little Rock Police Department the highest-paid municipal force in the State, and to provide LRPD with the equipment and tools it needs to protect Little Rock neighborhoods including the implementation of full-time social workers within the LRPD.

Mayor Scott has also worked to expand community programs to reduce violence as part of his holistic and comprehensive crime reduction strategy.

With quality of life and place as a priority, Mayor Scott has established a task force to address downtown development and density. Another task force is tasked with the goal of eliminating food deserts and ensuring all Little Rock residents have access to nutritious food. His renewed emphasis on parks and recreation has led to improvements at city parks and at the Little Rock Zoo, even as he works to identify and implement long-range strategies for War Memorial and Hindman parks.

FEATURED SPEAKERS



Floyd Simpson, III, CFA, CAIA

Director, PFM Asset Management

Floyd joined PFM Asset Management in 2019 and was the first external hire for the newly created Multi-Asset Strategies Group. As a director in our OCIO business he works with clients across the country to develop and implement multi-asset class strategies for their portfolios, along with being a voting member of our Multi-Asset Investment Committee.

Prior to joining the firm, Floyd worked as an investment officer where he was the associate portfolio manager for the Global and International Equity strategies. His duties included quarterly commentary on the developed markets and investment managers in his purview, monitoring the Global and Developed International Equity strategies, executing due diligence on managers across the G20 and Emerging Market regions, along with contributing intellectual content for ad hoc white papers. His experience includes working with retail and institutional clients to provide analysis and investment solutions.

Floyd serves on the Board of Trustees for A.T. Still University and Boys' Latin of Philadelphia. He is also an Executive Board Member of the CFA Society of Philadelphia. Floyd also was a former Investment Committee member for the Truman State University Foundation Board.



Megan Walsh Thompson

Mission Investment Officer, Ford Foundation

Megan Walsh Thompson has more than 15 years of impact investing and finance experience. As Mission Investment Officer at the Ford Foundation, she is responsible for sourcing, underwriting, and managing investments for the Foundation's impact investing portfolios.

Megan's contributions were instrumental in the development and launch of Ford's \$1 billion Mission Related Investment (MRI) fund. Ford's MRI fund seeks to achieve strong impact and financial returns across five thematic strategies: affordable housing, diverse fund managers, financial inclusion, global health tech and quality jobs. Megan also leads investments for Ford's \$350mm Program Related Investment fund, designed to catalyze investments in markets and opportunities often overlooked by traditional investors.

Prior to Ford, Megan spent several years working in fixed income at Citigroup. She earned her bachelor's degree in economics from The College of the Holy Cross and an MBA from Duke University's Fuqua School of Business.



Richard Turnley, III

Director of Institutional Sales & Marketing, Channing Capital Management, LLC

Richard Turnley, III is the Director of Institutional Sales and Marketing for Channing Capital Management, LLC. Mr. Turnley has over 25 years of investment management experience

and was formerly the President of Atlanta Wealth Advisors. Prior to Atlanta Wealth Advisors, Mr. Turnley was an investment management consultant for Bank of America and Smith Barney, where he was responsible for developing and managing client relationships with endowments, foundations, trusts and high net worth individuals. Prior to his work as an investment management consultant, Mr. Turnley was a corporate banking associate with Wachovia Bank. Mr. Turnley currently serves as Chair of the NASP Board of Directors, a member of the Parkland Health & Hospital System Investment Committee and a member of the Catholic Archdiocese of Atlanta Investment Committee. Mr. Turnley received a B.S. in Business Administration and an MBA from Florida A&M University.



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Marlon E. Kimpson (SC) is the attorney responsible for this communication. Our lawyers must make a case-by-case assessment of any claims. Prior results do not guarantee a similar outcome. Motley Rice LLC, a South Carolina Limited Liability Company, is engaged in the New Jersey practice of law through Motley Rice New Jersey LLC. Esther Berezofsky attorney responsible for New Jersey practice.



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FEATURED SPEAKERS



Tina Byles Williams

Chief Executive Officer, Chief Investment Officer and Founder, Xponance



Tina Byles Williams is Chief Executive Officer, Chief Investment Officer and Founder of Xponance®. She founded FIS Group, the predecessor firm to Xponance®, 24 years ago and has over 35 years of investment experience. Tina is the Chief Investment Officer and Lead Portfolio Manager for the firm's active global equity strategies. As Chief Investment Officer, she chairs the firm's Investment Committee, overseeing all investment strategy, manager search and disposition decisions for the multi-manager strategies. Tina is widely regarded as a trailblazer in the field of identifying and investing with talented entrepreneurial investment management firms, many of which are minority and women-owned. Prior to founding FIS Group, Tina was a principal and senior consultant with the investment consulting firm WHP, Inc.

Before joining WHP, Tina served as Chief Investment Officer to the City of Philadelphia's \$2.5 billion Board of Pensions and Retirement. Prior to her work with the Board of Pensions and Retirement, Tina was Chief Investment Officer for the \$300 million Philadelphia Gas Works Pension Fund.

Tina is a board member and chairs the Investment Committee of the ICMA Retirement Corporation (ICMA-RC), a provider of retirement services with over \$50 billion under management and administration. She is also a board member of the ICMA-RC's investment advisory subsidiary, Vantage Trust Company. She is a leader in her community and sits on the Pennsylvania Intergovernmental Cooperation Authority, which oversees the City of Philadelphia's financial plans, and the Center City District. Between 2011 and 2015, she served as a board member and chaired the Research Committee of the National Women's Business Council, a federal advisory council created to serve as an independent source of advice and counsel to the President, Congress and the U.S. Small Business Administration on economic issues of importance to women business owners.

Tina is the chairman and driving force behind Xponance's philanthropic entity, A Good Measure Foundation, which provides financial literacy education to inner city youth and supports programs designed to empower impoverished or marginalized women or children in the United States and internationally.

Tina is a recipient of several industry awards and has been quoted and featured in several national and global finance publications such as the *Wall Street Journal*, *Reuters*, *Institutional Investor*, *Bloomberg*, *Market Watch*, *Value Walk* and *Pensions and Investments*. She has also appeared on various business programs, such as Bloomberg GO and CNBC's Squawk Box.

Tina completed her undergraduate work at New York University where she graduated Magna Cum Laude and earned her Master's degree in Public Policy with an emphasis in Finance from Harvard University.

Ashley Zohn

Vice-President, Learning and Impact, Knight Foundation

Ashley Zohn joined Knight Foundation in January 2019 and was named Vice President, Learning and Impact, in March 2021.

Zohn, who has more than a decade of experience advancing data-driven decision-making in the nonprofit, public and private sectors, oversees Knight's research and assessment portfolios.

Knight commissions field-leading research on topics that affect communities, journalism and the arts, as well as surveys of public attitudes about the media, the First Amendment, and technology. Its assessment program increases the impact of grantmaking by evaluating Knight's investments and sharing insights widely.

Prior to Knight, Zohn oversaw the Continuous Improvement Program at the Federal Emergency Management Agency (FEMA). In this capacity, she was responsible for reviewing the agency's responses following federally-declared disasters and building continuous improvement capacity at FEMA's disaster operations.

In other roles at FEMA, Zohn oversaw a research portfolio of internal research and analysis projects, including the FEMASat program. Zohn also worked in community outreach at the American Red Cross. She began her career in marketing science.

She holds a Bachelor of Arts in sociology from Princeton University, a Master of Business Administration from MIT Sloan School of Management and a Master of Public Administration from Harvard Kennedy School of Government. She is a native of Miami.



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SCHEDULE OF EVENTS



DAY
01

MONDAY | JULY 24

All Conference Times Eastern

<p>7:00 AM - 5:00 PM MILLENNIUM FOYER</p>	<p>REGISTRATION & CHECK IN AREA OPEN Networking and Continental Breakfast</p>
<p>8:00 AM - 8:30 AM MILLENNIUM HALL Morning Plenary Session</p>	<p>WELCOME & OPENING REMARKS “Accelerating the Change: Partnerships for Progress” SPEAKERS: <i>Ronald C. Parker, President and CEO, National Association of Securities Professionals (NASP)</i> <i>Richard Turnley, III, Director of Institutional Sales & Marketing, Channing Capital Management, LLC - NASP Board Chair</i> <i>Derek Green, City of Philadelphia Council Member at Large</i></p>
<p>8:30 AM - 9:30 AM MILLENNIUM HALL Morning Plenary Session</p>	<p>Economic Outlook: A Global Analysis This year has seen a whirlwind when it comes to economic indicators, growth, and change. This session will delve into the numbers surrounding macroeconomic trends and provide some big picture analysis of the economic factors that may affect the capital markets. MODERATOR: <i>Benjamin Cotton, Chief Investment Officer, Pennsylvania Public School Employees’ Retirement System</i> PANELISTS: <i>Niso Abuaf, Chief Economist and Financial Strategist, Samuel A. Ramirez and Co. and Clinical Professor of Financial Economics, Pace University</i> <i>Tina Byles Williams, Chief Executive Officer, Chief Investment Officer, Xponance</i> <i>Cristian deRitis, Deputy Senior Economist, Moody’s Analytics</i> <i>Simona Mocuta, Chief Economist, State Street Global Advisors</i></p>
<p>9:30 AM - 9:45 AM</p>	<p>PROGRAM BREAK</p>

The NASP Institute

The NASP Institute offers education for trustees, investment staff and other institutional investors who select managers for investment purposes. This year, NASP's Institute will offer the following three sessions to members of the institutional investor community.

Sessions will take place during the 34th Annual Financial Services Conference on Monday, July, 24 2023 between 9:45 AM- 3:00 PM Eastern Time at the Loews Hotel in Philadelphia, PA.

Qualifies for up to 3 CPE credit hours. Field of Study: Finance. No advanced preparation needed. Prerequisite: Must currently serve as Trustees or Staff to an Institutional Fund or Family Office Program. Presented: Group Live

When you complete these sessions, you should be able to:

- Recognize and discuss the role of alternative investments in an investment portfolio.
- List three things to consider when evaluating alternative assets.
- List three diversification benefits of alternatives.
- Explain the SEC guidance on diversity and fiduciary duty.
- List two studies that have been conducted that prove diversity adds value.
- State three reasons why hiring diverse managers is a fulfillment of fiduciary duty.
- Recognize the key fundamentals of blockchain: what it is and how it works.
- List three real-world uses of blockchain technology.
- List the benefits and drawbacks of blockchain over traditional financial instruments.

Program levels are intermediate and advanced. Instructional Delivery Method: Group Live. For questions or additional information regarding refund, complaint, and/or program cancellation policies, please contact Marshay Hall at mhall@nasphq.org.

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DAY 01

MONDAY | JULY 24

All Conference Times Eastern

<p>9:45 AM - 10:45 AM COMMONWEALTH D Africa & Emerging Markets Summit (AEMS) Track</p>	<p>New US and G7 Commitments to the African Continent Recent policy shifts and announcements by the US government and indeed western nations comprised in the G7 have indicated a new and significant commitment to the African continent. Much of this was kicked off by the recent Africa Leaders/US Summit in Washington D.C. This session explores what the specifics of those initiatives are, what are the regional and country focus and the commensurate specific financial and resources commitment.</p> <p>MODERATOR: <i>Marlon Brown, Chief Executive Officer, Clarendon Global Partners</i></p> <p>PANELISTS: <i>Christopher Chijiutomi, Head of Africa and Managing Director, British International Investment</i> <i>Debra Erb, Managing Director, Real Estate Project Finance, United States International Development Finance Corporation</i> <i>Kendra Gaither, Vice-President, US-Africa Business Center, US Chamber of Commerce</i> <i>Cameron Khosrowshahi, Senior Investment Advisor, Prosper Africa</i> <i>Daleep Singh, Chief Global Economist, PGIM</i></p>
<p>9:45 AM - 10:45 AM COMMONWEALTH C The NASP Institute (TNI) Track</p>	<p>The Benefits of Alternatives In the continuing search for alpha, alternatives are becoming increasingly important to enhance the risk/return profile of the overall asset allocation. In this session, we'll explore the universe of alternatives such as private equity, hedge funds, venture capital, and real assets and the best way to access the growth opportunities in these asset classes.</p> <p>MODERATOR: <i>Joseph Haslip, Managing Director, Valor Equity Partners</i></p> <p>PANELISTS: <i>Christopher DiFusco, Chief Investment Officer, City of Philadelphia</i> <i>Elliot Feldman, Senior Vice President, Cerberus Capital Management, L.P.</i> <i>Michael Orr, Managing Director & Chief Investment Officer, Xponance Alts Solutions</i> <i>Betty Salanic, Chief Executive Officer, Accelerate Investors</i></p>
<p>9:45 AM - 10:45 AM COMMONWEALTH B Professional Development Series (PDS) Track</p>	<p>Stacking the Deck: The Benefits of Higher Education This panel will focus on promoting graduate school and professional designation programs such as the CFA, CAIA and CIMA. Panelists will discuss the pros and cons of additional certifications and how additional education can power your career.</p> <p>PANELISTS: <i>Joshua Barber, CFA, Research Analyst, Diamond Hill Capital Management</i> <i>Carlton Brown, Practice Area Leader, Justice, Diversity, Equity and Inclusion, Association of Governing Boards of Colleges and Universities</i> <i>Candice Fleischood, CAIA, Vice President, Investment Advisor, PNC Private Bank, CAIA Chapter Executive</i></p>



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Tina Byles Williams
 Founder, CEO and CIO



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DAY 01 MONDAY | JULY 24

All Conference Times Eastern

<p>10:45 AM - 11:00 AM</p>	<p>PROGRAM BREAK</p>
<p>11:00 AM - 12:30 PM MILLENNIUM HALL Luncheon Plenary Session</p>	<p>ESG in 2023: The Current Landscape Perspectives from Mayors: Building Stronger Communities</p> <p>Mayors play a critical role in building and maintaining vibrant communities across the United States. This panel will bring together mayors to share their perspectives on the challenges facing their cities and the strategies they are implementing to overcome them.</p> <p>The panel will begin by addressing the current state of their cities and the most pressing issues they face. Topics may include affordable housing, economic development, public safety, transportation, and environmental sustainability. The mayors will also discuss how their cities have been affected by recent events, such as the COVID-19 pandemic and social justice protests.</p> <p>The panel will then turn to the strategies that these mayors are employing to build stronger, more resilient communities. Throughout the discussion, the mayors will share best practices and lessons learned from their experiences leading cities of different sizes and geographies.</p> <p>Attendees will come away from this panel with a deeper understanding of the challenges and opportunities facing cities and the key role that mayors play in shaping and positioning their communities for the future.</p> <p>SPEAKER: <i>Jamiyl Flemming, Senior Vice-President, Siebert, Williams, and Shank</i></p> <p>MODERATOR: <i>Guy Logan, Managing Director, Head of National Infrastructure, Raymond James & Associates, Inc.</i></p> <p>PANELISTS: <i>Andre Dickens, Mayor, City of Atlanta</i> <i>Steven Reed, Mayor, City of Montgomery, Alabama, 1st Vice President, African American Mayors Association</i> <i>Frank Scott, Jr, Mayor, Little Rock, Arkansas, Immediate Past President of African American Mayors Association</i></p>
<p>12:30 PM - 12:45 PM</p>	<p>PROGRAM BREAK</p>
<p>12:45 PM - 1:45 PM COMMONWEALTH D Africa & Emerging Markets Summit (AEMS) Track</p>	<p>New Directions in Investment into Africa</p> <p>This panel explores new trends in investment approaches in Africa from Sovereign Wealth Funds, Impact and Angel Investing and Permanent Capital Vehicles. The audience will gain insight into approaches for structuring, execution and harvesting investment in Africa and new trends in financial instruments, co-investment partners and exit opportunities.</p> <p>MODERATOR: <i>Wilmot Allen, Founder, VentureLift Africa</i></p> <p>PANELISTS: <i>Badr Drissi, Chief Investment Officer, Ithmar Capital</i> <i>Dia Martin, Managing Director, US Development Finance Corporation</i> <i>Eric Osiakwan, Managing Partner, Chanzo Capital</i> <i>Quinton Zunga, Chief Executive Officer, RH Managers</i></p>

DAY
01

MONDAY | JULY 24

All Conference Times Eastern

<p>12:45 PM - 1:45 PM COMMONWEALTH C The NASP Institute (TNI) Track</p>	<p>Choosing Diversity as a Fiduciary Duty The case for diversity has gained momentum over the past few years with many Allocators embracing DEI and adopting diversity initiatives. Furthermore, in 2022, the Securities and Exchange Commission posted guidance confirming investors can consider Diversity, Equity, and Inclusion as part of their fiduciary duty in the investment process. Despite this progress, many states are challenging diversity initiatives, with some going so far as to call diversity efforts ‘illegal.’ This panel will offer concrete evidence that debunks the notion that fiduciary duty is a headwind when considering diverse managers and prepare Plan Sponsors to address any challenges to diversity.</p> <p>MODERATOR: <i>Malik Murray, Senior Vice President, Head of Business Development, Ariel Investments</i></p> <p>PANELISTS: <i>David P. Brand, Chair, City of Atlanta General Employees’ Pension Board</i> <i>Marlon Kimpson, Member Attorney, Motley Rice</i> <i>Michael Knowling, Executive Vice President and Head of Insurance and Asset Owners, North America, State Street</i></p>
<p>12:45 PM - 1:45 PM COMMONWEALTH B Professional Development Series (PDS) Track</p>	<p>“Priming the Pump” - Business Development & Networking Panel discussion covering the do’s and don’ts of relationship management. Panelists will discuss data analytics, data platforms, and implementing business development strategies utilizing data.</p> <p>MODERATOR: <i>Jill Banaszak, Senior Vice-President, Omni Success, EVestment (NASDAQ)</i></p> <p>PANELISTS: <i>Sean Chatburn, CFA, Head of North American Equity Manager Research Mercer Investment Consulting</i> <i>Gary Guibert, Senior Vice President, Public Funds, Northern Trust</i> <i>Eric Thielscher, Global Head of Public Equities, Cambridge Associates</i></p>
<p>1:45 PM - 2:00 PM</p>	<p>PROGRAM BREAK</p>

DAY 01

MONDAY | JULY 24

All Conference Times Eastern

<p>2:00 PM - 3:00 PM COMMONWEALTH D Africa & Emerging Markets Summit (AEMS) Tracks</p>	<p>Exploring Investment Opportunities in Africa’s Pathway to Building Greener Economies</p> <p>The topic will explore potential investment opportunities for investors looking to support Africa’s transition from fossil-based, to cost efficient and greener energy sources. However, this transition requires mixed investment strategies to finance green projects. The panel will aim to explore bankable projects to ensure Africa’s energy security, whilst exploring opportunities on the continent to support emerging industries, creating jobs and addressing inequality. What can be done to mobilize resources and coordinate efforts to build climate-resilient assets on the diaspora?</p> <p>MODERATOR: <i>Tara Sabre Collier, Director, Impact Investing and Sustainable Finance, Team Lead, MOBILIST Policy Platform, Chemonics International</i></p> <p>PANELISTS: <i>Faheen Allibhoy, Managing Director & Head of JPM Development Finance Institution, JP Morgan</i> <i>Sihame Arbib, Chief Executive Officer, Victory Capital</i> <i>Langa Madonko, Deputy President, Association of Black Securities and Investment Professionals (ABSIP)</i> <i>Ron Mincy, Head of Africa, Climate Finance Partnership, BlackRock</i></p>
<p>2:00 PM - 3:00 PM COMMONWEALTH C The NASP Institute (TNI) Track</p>	<p>Blockchain: Potential Applications in Financial Markets</p> <p>For many, blockchain technology is a complex and intimidating subject. Is enough known about Blockchain to make it a safe investment for Institutional Investors? The goal of this session is to demystify blockchain and provide an understanding of the potential applications blockchain technologies offer in financial markets.</p> <p>MODERATOR: <i>Lee Stephens, Executive Vice-President, Segment Manager, BNY Mellon</i></p> <p>PANELISTS: <i>Charlene Fadirepo, Chief Executive Officer, Mango Digital Strategies</i> <i>Alvaro Vega, Vice-President, Implementation Solutions Group, Callan LLC</i></p>
<p>2:00 PM - 3:00 PM COMMONWEALTH B Professional Development Series (PDS) Track</p>	<p>“Until the Wheels Fall Off – Retention and Longevity in Financial Services”</p> <p>A panel discussion which offers insights to how best to navigate the industry, avoid toxicity and become a long tenured Wall Street veteran.</p> <p>PANELISTS: <i>Will Greene, Senior Vice President, Loop Capital</i> <i>Ronald Taylor, Portfolio Specialist, T. Rowe Price</i> <i>Wandie Toledo, Diversity Acquisition Leader, T. Rowe Price</i></p>

SCHEDULE OF EVENTS

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MONDAY | JULY 24

All Conference Times Eastern

<p>3:00 PM - 3:15 PM</p>	<p>PROGRAM BREAK</p>
<p>3:15 PM - 4:15 PM MILLENNIUM HALL Afternoon Plenary Session</p>	<p>Harnessing Investment Opportunities Across Africa and the Diaspora How do we harness the investment opportunities in Africa, Latin America and the Caribbean, regions with large African diaspora with an estimated GDP of over \$4 trillion which are still underserved from a developmental perspective? This session will explore how an increased and coordinated structured investment in the diaspora, with the removal of barriers could create formidable prosperous economic blocs.</p> <p>INTRODUCTION: <i>Ope Onibokun, Investment Director, British International Investment</i></p> <p>MODERATOR: <i>Polo Leteka Radebe, President, Association of Black Securities and Investment Professionals (ABSIP)</i></p> <p>PANELIST: <i>Reta Jo Lewis, President and Chair, Board of Directors, Export - Import Bank of the United States</i></p>
<p>4:15 PM - 4:30 PM MILLENNIUM HALL</p>	<p>MiDA Activities & Initiatives SPEAKER: <i>Aymeric Saha, Chief Executive Officer, MiDA Advisors</i></p>
<p>4:30 PM - 6:30 PM MILLENNIUM FOYER</p>	<p>WELCOME RECEPTION</p>



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SCHEDULE OF EVENTS



DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>7:00 AM - 5:00 PM MILLENNIUM FOYER</p>	<p>REGISTRATION & CHECK IN AREA OPEN Networking and Continental Breakfast</p>
<p>8:00 AM - 9:00 AM MILLENNIUM HALL Morning Plenary Session</p>	<p>Chief Diversity Officer Panel Chief Diversity Officers are the principal architects of a company's diversity, equity, and inclusion (DEI) programs. They are responsible for creating, managing and optimizing all efforts related to making their corporations more equitable environments for all employees. This panel of distinguished CDOs will share their views on the current state of DEI in Corporate America, what programs and initiatives their respective companies have implemented (including plans for the future) in the DEI space, and how NASP can play a role in their efforts.</p> <p>MODERATOR: <i>Richard Turnley, III, Director of Institutional Sales & Marketing, Channing Capital Management, LLC - NASP Board Chair</i></p> <p>PANELISTS: <i>Kimberly Evans, Head of Corporate Sustainability, Inclusion and Social Impact, Northern Trust</i> <i>Shawna Ferguson, Director of Global Diversity, Equity & Inclusion, Wellington Management</i> <i>Johnathan Medina, Managing Director, Head of Diversity, Equity, and Inclusion, Macquarie Asset Management</i> <i>Fatima Shama, Head of Diversity and Inclusion, US, Bloomberg, LP</i></p>
<p>9:00 AM - 9:15 AM</p>	<p>PROGRAM BREAK</p>
<p>9:15 AM - 10:15 AM MILLENNIUM HALL Morning Plenary Session</p>	<p>Moving Forward - Together: Leadership and Strategy in a New Era of DEI Challenges "How can we be bold and proactive when diversity is challenged?" During this session, NASP President and CEO Ronald C. Parker will join heads of like-minded organizations and legislative allies to discuss Diversity, Equity and Inclusion efforts and challenges being posed to these efforts. Session themes include uniting around common mission and goals, accountability, as well as data gathering and analysis. Don't miss this important conversation!</p> <p>MODERATOR: <i>Ronald C. Parker, President and CEO, National Association of Securities Professionals</i></p> <p>PANELISTS: <i>Brenda Chia, Board Co-Chair, Association of Asian American Investment Managers</i> <i>Robert Greene, President and CEO, National Association of Investment Companies</i> <i>Anyori Hernandez, President and Chief Executive Officer, New America Alliance</i> <i>Erica Miles, Senior Lead Diversity and Inclusion Consultant, SVP Diverse Segments, Representation and Inclusion, Wells Fargo</i> <i>Christian Nwasike, MFP, MBA, Chairman, Board of Directors, Association of African American Financial Advisors</i></p>

SCHEDULE OF EVENTS



DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>10:15 AM - 10:30 AM</p>	<p>PROGRAM BREAK</p>
<p>10:30 AM - 11:30 AM COMMONWEALTH B Institutional Track</p>	<p>Private Equity: Another Closer Look</p> <p>This panel will discuss the various new developments, pools of capital and fund structures within the private equity asset class. This breakout session will feature professionals from LP, Asset Managers and GPs discussing and evaluating alternative strategies to traditional Private Equity. Including Co-investment, Secondaries, Continuation funds, Seeding, and Shared GP economics.</p> <p>MODERATOR: <i>Patricia Miller Zollar, Managing Director, Neuberger Berman</i></p> <p>PANELISTS: <i>Bernard Buckley, Deputy Chief Investment Officer, City of Philadelphia</i> <i>Marquette Chester, Senior Managing Director, Xponance Alternatives</i> <i>Joe T. Dawson, Director, Private Equity, New York Common Retirement Fund</i> <i>Aaron Gillum, Senior Vice President, Private Equity, 50 South Capital</i> <i>Chryssa Rask, Vice-President, Supply Chain, Cerberus Capital Management</i></p>
<p>10:30 AM - 11:30 AM COMMONWEALTH C Wealth Management Track</p>	<p>Efficient Wealth Transfer: Black Family Generational Wealth</p> <p>This panel discussion will focus on the topic of Black/African American generational wealth transfer strategies. The aim of this discussion is to explore and highlight strategies for building and transferring wealth across generations, with a particular focus on the Black/African American community. The panel will feature experts and thought leaders who have experience and expertise in this area, including financial planners, wealth managers, lawyers, and academics. They will discuss various wealth transfer strategies, including estate planning, trusts, and other vehicles that can help build and protect generational wealth.</p> <p>MODERATOR: <i>Sheena Gray, MBA, Executive Director & Head of Diverse Advisor Experiences, J. P. Morgan Wealth Management</i></p> <p>PANELISTS: <i>Melinda Hightower, Managing Director, Head of Multicultural Client Segments Wealth Management USA, UBS</i> <i>Cindy Hoes, Associate Vice President, Nationwide Retirement Institute, Nationwide</i> <i>Linda Nolan, Senior Vice President, Wealth Management, Senior Managing Director, Northern Trust</i></p>



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DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>10:30 AM - 11:30 AM COMMONWEALTH D Municipal Track</p>	<p>Inflation’s Impact on the Municipal Market Municipal volatility has risen throughout most of 2022 and 2023 to date alongside a move higher in yield amid a more hawkish Federal Reserve and heightened inflation. Inflation can raise the anticipated costs of issuer capital programs which are planned over a lengthy time horizon along with the allocation of funding sources. The surge in interest rates and interest rate volatility has focused issuer attention on capital markets solutions for mitigating potentially higher borrowing costs while optimizing the timing of their financings. Accordingly, issuers may contemplate bringing forward planned latter year or subsequent fiscal year borrowings while taking advantage of reinvestment opportunities or expand the use of interim borrowings like commercial paper and put bonds. Our panelists will discuss how they are managing ongoing inflation challenges as they finance their capital programs.</p> <p>MODERATOR: <i>Euriah Bennett, Director, Citigroup</i></p> <p>PANELISTS: <i>Jacqueline Dunn, Treasurer, City of Philadelphia</i> <i>Adam Layne, Treasurer, City of St. Louis, Missouri</i> <i>Vernon Lewis, MBA, ACPFIM, CPM, Assistant Director, Treasury Department, City of Houston</i> <i>Horatio Porter, Chief Financial Officer, North Texas Tollway Authority</i></p>
<p>11:30 AM - 11:45 AM</p>	<p>PROGRAM BREAK</p>
<p>11:45 AM - 1:15 PM MILLENNIUM HALL Luncheon Plenary Session</p>	<p>JOYCE JOHNSON AWARDS LUNCHEON During this intimate fireside chat, Shawn Lytle and Carla Harris will discuss the legacy of female NASP founder, Joyce Johnson and how a new generation of minority female finance professionals and entrepreneurs - despite continued challenges - are thriving today.</p> <p>SPEAKERS: <i>Shawn Lytle, Senior Managing Director, Head of Public Investments, Macquarie Asset Management, Head of Americas – Macquarie Group</i> <i>Carla Harris, Senior Client Advisor & Managing Director, Morgan Stanley</i></p>
<p>1:15 PM - 1:30 PM</p>	<p>PROGRAM BREAK</p>

DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>1:30 PM - 2:30 PM COMMONWEALTH B Institutional Track</p>	<p>Institutional Impact Investing: What ESG and Impact Investing Have To Do With You</p> <p>According to the Global Impact Investing Network, the size of the worldwide impact investing market has reached \$1.164 trillion. The increased attention, momentum, and regulation as well as pushback related to ESG and Impact Investing, poses a challenge to know where your strategy fits, how to market it, and who is interested. Join this session for an intro to the fundamentals of ESG and Impact Investing, hear from LPs leaning into values-aligned investing, and gain insights into developing your own investment and/or business development strategy.</p> <p>MODERATOR: <i>Erika Seth Davies, Chief Executive, Rhia Ventures</i></p> <p>PANELISTS: <i>Amani Boras, Managing Director, Head of ESG, State Street International</i> <i>Dominique Cherry, Senior Governance Manager, Maryland State Retirement System</i> <i>Christopher Graham, Chief Investment Officer, Nationwide</i> <i>Julius Kimbrough, Impact Officer, Mary Lewis Babcock Foundation</i></p>
<p>1:30 PM - 2:30 PM COMMONWEALTH C Wealth Management Track</p>	<p>Health is Wealth for Diverse Families</p> <p>Join us for a panel discussion on the importance of health and wealth for diverse families. Our panelists will discuss the unique challenges and opportunities facing families of color, and offer insights on how to improve health and financial outcomes. This discussion will focus on: The health disparities facing families of color; the financial challenges facing families of color; The role of community in improving health and wealth for families of color; and How to improve health and wealth for families of color.</p> <p>MODERATOR: <i>Kennie Taylor, Sr. CIMA, CDFA, CLTC, Client Advisor, Vice President of Investments, Tailored Financial Strategies of Alex Brown</i></p> <p>PANELISTS: <i>Anthony Barr, Research and Impact Director, National Bankers' Association</i> <i>Stephen Briggs, Senior Community Impact and Sustainability Specialist, Vice-President, Philanthropy and Community Impact, Wells Fargo</i> <i>Kennie Taylor, Jr., Practice Marketing Associate, Tailored Financial Strategies of Alex. Brown</i> <i>Mary Elizabeth Taylor, Vice-President, International Government & External Affairs, Robinhood</i></p>

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DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>1:30 PM - 2:30 PM COMMONWEALTH D Municipal Track</p>	<p>Sustainable Infrastructure’s Perpetual Benefits Environmental, social, and governance, capital programs are being politicized and coming under more scrutiny from: regulators, politicians, and the public. Perhaps a more acute focus on sustainable infrastructure-- designed to meet the essential service needs of communities-- might mitigate some of the ESG backlash. Although, sustainable infrastructure has not markedly garnered a lower cost of capital for issuers it is getting more attention from investors. This panel will explore how sustainable infrastructure can continue to flourish and ultimately reduce borrowing costs for issuers; thereby enabling them to expand their capital improvement programs.</p> <p>INTRODUCTION: <i>C. Courtney Knight, Treasurer, City of Atlanta</i></p> <p>MODERATOR: <i>Trenton J. Allen, CEO, Sustainable Capital Advisors</i></p> <p>PANELISTS: <i>Mohamed Balla, Chief Financial Officer, City of Atlanta</i> <i>Henry McKoy, Jr. PhD, Director, Office of State and Community Energy Programs (SCEP), US Department of Energy</i> <i>Samuel Smalls, Treasury and Debt Manager, Metropolitan Water District of Southern California</i> <i>David Womack, Deputy Director, Financing Policy and Coordination, New York City Office of Management and Budget</i></p>
<p>2:30 PM - 2:45 PM</p>	<p>PROGRAM BREAK</p>
<p>2:45 PM - 3:45 PM COMMONWEALTH B Institutional Track</p>	<p>Taking Advantage of Market Volatility – Pulling New Levers Market volatility presents new opportunities for investors – both short term and long term. This session will discuss unique strategies in the marketplace, how allocators are finding the right fit and what is not just trendy, but alpha generating. Hear about what’s hot in non-conventional real estate such as manufactured housing, self-storage, other facilities; taking advantage of the energy transition; the base case and the future in the banking industry and regional banks’ failures impacts on private markets and public markets; and credit strategies in long/short and private debt.</p> <p>MODERATOR: <i>Mohamed El Kordy, PhD., Senior Investment Officer, New York State Common Retirement Fund</i></p> <p>PANELISTS: <i>Terrance Davis, Senior Portfolio Manager, Florida State Board of Administration</i> <i>William Demas, Head of Americas - Green Investment Group, Macquarie Asset Management</i> <i>Rahul Desai, CFA, Senior Portfolio Advisor, Aksia</i> <i>Brian Nottage, PhD, CFA, Senior Vice-President, Head of Strategy, JP Morgan Asset Management</i> <i>Janet Londono Valle, Senior Investment Officer – Real Estate, New York City Bureau of Asset Management</i></p>

DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>2:45 PM - 3:45 PM COMMONWEALTH C Brokerage Track</p>	<p>Inclusion and Partnership in Private Markets Where We Were, Where We Are, and Where We are Going! Institutional global funding and investment management professionals join in a discussion on how DE&I initiatives have improved, and look at future challenges and opportunities. These panelists and their organizations are major contributors to increased investment management and banking deal participation of diversity financial services firms. They have also required and supported inclusion of boutique Broker-Dealers on institutional trading platforms like Market Axess and Bloomberg. Both traditional and alternative investments in private markets will be explored. Hear about the value-add expectations of Brokers, Investment Managers and Minority Depository Institutions.</p> <p>MODERATOR: <i>Reginald Scantlebury, Senior Managing Director, Stern Brothers</i></p> <p>PANELISTS: <i>Andrew J. Cohen, Managing Director, Institutional Annuities, New York Life Insurance Company</i> <i>Eion D'Anjou, Portfolio Manager, Blackrock</i> <i>Kimberly A. Ellis, Chief Financial Officer and Treasurer, Dormitory Authority of New York</i> <i>Teresa Metzler, Executive Director, Treasury, Comcast Corporation</i></p>
<p>2:45 PM - 3:45 PM COMMONWEALTH D Municipal Track</p>	<p>Funding the Capital Needs of HBCUs This panel will explore how some HBCUs have overcome the barriers of accessing the capital markets, by utilizing various creative financing solutions, such as federal loans and Public-Private Partnerships, to meet funding needs. HBCUs capital needs remain massive. This will afford financial advisors, bond attorneys, investors, and bankers the opportunity to assist these important issuers with their sizable, deferred maintenance and capital improvement programs in the coming years</p> <p>MODERATOR: <i>Anthony Kinsey, Director, UBS</i></p> <p>PANELISTS: <i>Sidney H. Evans Jr. Senior Vice President, Finance & Chief Financial Officer, National Urban League</i> <i>Wilbourne Rusere, Associate Vice President, Finance & Administration, Lincoln University</i></p>
<p>3:45 PM - 4:00 PM</p>	<p>PROGRAM BREAK</p>

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SCHEDULE OF EVENTS



DAY 02 TUESDAY | JULY 25

All Conference Times Eastern

<p>4:00 PM - 5:00 PM MILLENNIUM HALL Afternoon Plenary Session</p>	<p>Where Do We Go From Here? Modern Solutions for Tomorrow's Portfolio Considering the many macro-economic factors that are creating major headwinds for classically constructed portfolios, we will explore how to address new problems. Specifically, this panel discussion will address the critical questions relating to the future source of returns, opportunities, and risks amid a backdrop of meaningful shifts in global monetary policy, increased geopolitical risks, increased public market volatility, and the possibility that private market investments may offer diminished return profiles going forward. The CIOs on this panel will discuss how to be on the leading edge of charting more progressive paths to meeting their investment objectives and how to end up on the right side of change. 2023 is a fitting time to convene a group of peers and investment leaders for an open exploration of these key issues.</p> <p>MODERATOR: <i>David Holmgren, Former Chief Investment Officer, Hartford Healthcare</i></p> <p>PANELISTS: <i>Jayson Bronchetti, Executive Vice President, Chief Investment Officer (CIO), Head of Risk & Sustainability, Lincoln Financial Group</i> <i>Raynald Leveque, Chief Investment Officer, New Hampshire Retirement System</i> <i>Angelo Manioudakis, Executive Vice President - Chief Investment Officer, Northern Trust</i> <i>Sebastien Page, Head of Global Multi-Asset and Chief Investment Officer, T. Rowe Price</i></p>
<p>5:00 PM - 6:00 PM</p>	<p>PROGRAM BREAK</p>
<p>6:00 PM - 8:00 PM MILLENNIUM HALL</p>	<p>AWARDS CEREMONY & RECOGNITION RECEPTION EMCEE: <i>Monica Bertran, Employee Engagement Digital Platforms & Innovation, Bloomberg</i></p>

DAY 03 WEDNESDAY | JULY 26

All Conference Times Eastern

<p>8:00 AM - 11:00 AM MILLENNIUM FOYER</p>	<p>REGISTRATION & CHECK IN AREA OPEN Networking and Continental Breakfast</p>
<p>9:00 AM - 10:30 AM MILLENNIUM HALL Morning Plenary Session</p>	<p>NASP Townhall Meeting: NASP HQ/Institute/Chapter Update NASP Headquarters will share updates on upcoming events, as well as national and chapter specific initiatives in this wide-ranging plenary session.</p> <p>SPEAKER: <i>Ronald C. Parker, President and CEO, National Association of Securities Professionals (NASP)</i></p>

SCHEDULE OF EVENTS



DAY 03

WEDNESDAY | JULY 26

All Conference Times Eastern

10:30 AM -10:45 AM	PROGRAM BREAK
<p>10:45 AM - 11:45 AM</p> <p>MILLENNIUM HALL</p> <p>Morning Plenary Session</p>	<p>Consultant Roundtable</p> <p>Institutional investment consultants play a significant role in the decision-making process of institutional asset owners. It is estimated that the 10 largest consulting firms advise on \$35-\$40 trillion in AUM. This influence on portfolio allocations and strategies, as well as manager consideration and selection, makes them a continuing focal point for institutional asset managers. How well do the business models of investment consultants align with continuous research for enhancing portfolio outcomes and talent? Could/should consultants be more proactive in driving towards a more inclusive manager eco-system and bringing clients along with broader success and impact goals? Research or relationships, which comes first in the consultant chicken & egg for opportunity consideration? Are there significant distinctions in the approaches taken by (or your response to) large/small firms in gaining meaningful access for strategy approvals and searches?</p> <p>MODERATOR: <i>DeAnna Ingram Jones, Consultant, NEPC</i></p> <p>PANELISTS: <i>Samantha Grant, CFA, CAIA, Senior Consultant, Verus</i> <i>Tony Johnson, Director of Midwest Consulting, Principal, RVK, Inc.</i> <i>Avery Robinson, CAIA, Senior Vice President, Real Assets Consulting Group, Callan LLC</i> <i>Floyd Simpson, Director, PFM Asset Management</i></p>
11:45 AM - 12:00 PM	PROGRAM BREAK
<p>12:00 PM - 1:00 PM</p> <p>MILLENNIUM HALL</p> <p>Afternoon Plenary Session</p>	<p>Endowments/Foundations Panel</p> <p>A high-level discussion on the implications of current market conditions and within this context, analyze trends in best practices in investment strategy, risk management and market engagement.</p> <p>Panelists will also discuss the role ESG and DEI plays in their portfolios. How are some planning to help diverse owned firms tackle institutional barriers considering foundations with an intentional focus on racial equity as they work to reach their ESG and DEI goals.</p> <p>MODERATOR: <i>Ashley Zohn, Vice-President, Learning and Impact, Knight Foundation</i></p> <p>PANELISTS: <i>Larry Bomback, Senior Vice President & Treasurer, Curtis Institute</i> <i>Orlando C. Esposito, Chief Financial Officer, Philadelphia Foundation</i> <i>Michael Miller, Chief Investment Officer, Crewcial Partners</i> <i>Megan Walsh Thompson, Mission Investment Officer, Ford Foundation</i></p>
1:00 PM	Grab & Go Box Lunch CONFERENCE CLOSE

The logo for the National Association of Securities Professionals (NASP) is displayed in white, bold, sans-serif font within a dark blue rectangular box. The background of the entire page is a night-time aerial view of a city skyline, likely Singapore, with numerous skyscrapers illuminated and a body of water in the foreground. Overlaid on the skyline are several glowing blue arcs and dots, suggesting a network or global connectivity.

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NASP Staff

Ronald C. Parker

President & CEO, NASP

Marshay Hall

Director of Programs &
Communications, NASP

Marie-Penda Toure

Executive Assistant &
Membership Director, NASP

Brianna Hooks

Finance Associate, NASP

Banna Araya

Summer Associate

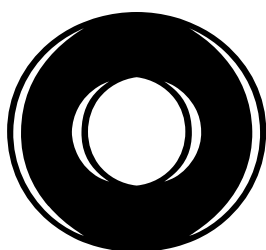
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