



**NASP 2022 Annual Financial Services Conference**  
**Theme: Breaking the Status Quo: Leading With Renewed Purpose**

**June 27-29 2022**  
**Chicago, IL**  
**Radisson Blu Hotel**

Date: Monday; June 27, 2022 ALL TIMES CENTRAL				
Time	Session Title / Description	Speaker(s)	Track/ Location	Session Champion/ Co-Chair
8:30 AM -9:00 AM	Opening & Welcome Remarks	<b>Speaker:</b> Ronald C. Parker, President & CEO, NASP <b>Speaker:</b> Richard Turnley, III, Board Chair NASP <b>Speaker:</b> Michael Frerichs, Treasurer, State of Illinois	Plenary  <b>Atlantic Ballroom</b>	
9:00 AM- 10:00 AM	<b>Morning Plenary – Global Economic Outlook</b>  This year's Global Economic Outlook will focus on macroeconomic trends underpinning the markets in regions around the world. We will particularly focus on how inflation, conflict, COVID, politics and other disruptions will play into market conditions over the short and medium term.	<b>Moderator:</b> Greg Maddox, Head, Global Manager Research, Wells Fargo <b>Panelist:</b> Jarred Glansbeek, Chief Investment Officer, RisCura <b>Panelist:</b> Ellen Zentner, Managing Director, Chief US Economist, Morgan Stanley	Plenary  <b>Atlantic Ballroom</b>	
10:00 AM – 10:20 AM	Program Break	N/A		
10:20 AM – 11:15 AM	<b>Welcoming Remarks:</b> Aymeric Saha, Chief Executive Officer, MiDA Advisors  <b>Keynote:</b> Akunna E. Cook, Deputy Assistant Secretary, Bureau of African Affairs, US State Department  <b>Allocator Perspectives Panel</b>	<b>Introduction:</b> Anne-Marie D’alton, Chief Executive Officer, Chief Batseta, Council of Retirement Funds for South Africa  <b>Moderator:</b> Joanne Yoo, Partner, DPI	Africa and Emerging Markets Summit  <b>Pacific Ballroom 1 - 3</b>	



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	<p>Africa is the fastest growing continent, booming with innovation as a result of the rapidly urbanizing population. However, the continent has yet to see allocators across the globe invest at the pace of its growth. During this panel discussion, you will hear institutional investors from both developed and developing markets discuss how they think about investing in Africa, various opportunities through partnerships and co-investments, and the hurdles they have had to overcome.</p>	<p><b>Panelist:</b> Josphat Muriuki, CEO and Trust Secretary, KenGen SRBS and KenGen Defined Contribution Scheme</p> <p><b>Panelist:</b> Ndabe Mkhize, Chair, Investment Committee, Asset Owners Forum South Africa</p> <p><b>Panelist:</b> Daniel Miller, Deputy Executive Director, New York City Board of Education Retirement System</p>		
<p>10:20 AM - 11:15 AM</p>	<p><b>Sourcing the Best Diverse Managers</b></p> <p>We've all heard the results of the Knight Foundation that diverse firms manage about 1.4% of \$69 trillion dollars in assets and it's not due to poor performance, because these diverse managers perform as well or better than their majority-owned counterparts. Despite the social unrest in 2020 that sparked a renewed focus on DE&amp;I, the percentage of assets allocated to diverse managers has not improved. This panel will offer solutions to increase the utilization of</p>	<p><b>Welcome Remarks</b></p> <p><b>Instructor:</b> Angela Matheny, Director of Investment Staff and Diverse Manager Equity, Crewcial Partners</p> <p><b>Instructor:</b> Winston Blake, President, Attucks Asset Management</p> <p><b>Instructor:</b> Angela Miller-May, Chief Investment Officer, Illinois Municipal Retirement Fund</p>	<p>The NASP Institute</p> <p><b>Adriatic/Aegean</b></p>	



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	diverse asset managers, broker/dealers and other service providers.	<b>Instructor:</b> Andrew Folsom, Senior Investment Analyst, Wells Fargo		
10:20 AM - 11:05 AM	<p><b>Realize The Power of a Positive Mental Approach to Leadership</b></p> <p>The challenges of navigating business activity in periods of extreme disruption and constant change can be taxing on one’s mental and physical well-being. Leaders must strive for increased productivity but must also be concerned about employee health and potential burnout.</p> <p>Join us as mental health professionals and business leaders share thoughts on how to best manage teams with a focus on personal/professional balance, effective communication, while emphasizing the need to find joy and purpose in the work they do.</p>	<p><b>Moderator:</b> Jodi Brockington, Founder and Lead Consultant, NIARA Consulting</p> <p><b>Panelist:</b> Jeffrey Ferguson, Associate Director, Living Cities</p> <p><b>Panelist:</b> Mimi Chiahemmen, Global Head of Well-Being and Career Development, Euromoney Institutional Investor PLC</p>	<p>Professional Development Series</p> <p><b>Baltic/Bering</b></p>	
11:05 AM - 11:15 AM	Program Break			
11:15 AM - 12:00 PM	<b>Infrastructure Panel</b>	<b>Introduction:</b> Sundeep Raichura, Group CEO, Zamara Group	Africa and Emerging Markets Summit	



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	<p>Africa’s infrastructure needs are estimated to be \$170 Billion per year by 2025 by the African Development Bank. The estimated gap in funding is approximately \$100 billion per year! Given that the continent is the fastest growing in the world and has the fastest urbanization rates, cities and urban agglomerations feel the pressure acutely of the lack of infrastructure resources to provide adequate infrastructure for the growth of the continent.</p> <p>Within the difficulty and issues created by these challenging gaps and issues, there are opportunities for investors and innovative finance leaders. Some of the current challenges include pandemic-related bottlenecks and lack of access to raw materials, rising interest rates on infrastructure debt for EM countries, net zero targets and climate financing requirements that seek to balance economic growth with climate impact, and adequate structures between governments, commercial partners and institutional investors that make financing and collaboration possible.</p> <p>This panel explores and discusses all the issues mentioned with a group on industry experts and practitioners who are deeply involved with these efforts in Africa. The panel will explore emerging and</p>	<p><b>Moderator:</b> Marlon Brown, CEO, Clarendon Global Partners</p> <p><b>Panelist:</b> Debra Erb, Managing Director , Real Estate Project Finance, Office of Development Credit U.S. International Development Finance Corporation</p> <p><b>Panelist:</b> Sola Lawson, Co-Managing Partner, AIIM</p> <p><b>Panelist:</b> Henry Kyanda, Managing Director, Everstrong</p> <p>Panelist: Neala Wanjala, Acting Head of Legal, Public Private Partnership Directorate, The National Treasury, Kenya</p>	<p align="center"><b>Pacific Ballroom</b>  <b>1 - 3</b></p>	
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	innovative solutions that are tackling and having success despite the challenges.			
11:15 AM - 12:10 PM	<p><b><i>Understanding the Federal Reserve and Monetary Policy</i></b></p> <p>The Federal Reserve was created by Congress to provide the nation with a safer, more flexible, and more stable monetary and financial system. This session will explain what the Federal Reserve is, how it works and how it affects the financial markets.</p>	<p><b>Moderator:</b> James Haddon, Managing Director &amp; Head of Marketing, Ramirez Asset Management</p> <p><b>Panelist:</b> Deborah Leonard, Managing Director of Chicago Office, Markets Group, Federal Reserve Bank of New York</p> <p><b>Panelist:</b> Kristina Hooper, CFP, CAIA, CIMA, CHFC, Chief Global Market Strategist, Invesco</p>	<p>The NASP Institute</p> <p><b>Adriatic/Aegean</b></p>	
11:15 AM - 12:00 PM	<p><b><i>Navigating and Excelling in Your Career in a Hybrid Work Environment</i></b></p> <p>With the Post-Covid transition to more flexible work experiences, how will workplace relationships change?</p> <p>What must young professionals be prepared for as they look to become leaders of diverse teams that are collaborating remotely?</p>	<p><b>Moderator:</b> Kila Weaver, Vice-President, Marketing and Client Services, Xponance</p> <p><b>Panelist:</b> Monique Pryor, Chief Engagement &amp; External Affairs Officer, St Francis College Brooklyn</p> <p><b>Panelist:</b> Johnita Walker-Mizelle, Senior Principal, US Distribution, Sagard</p>	<p>Professional Development Series</p> <p><b>Baltic/Bering</b></p>	



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	<p>How must they be ready to engage, communicate and contribute while being self-aware and understanding of the demands and metrics that are expected.</p> <p>Listen in as a panel of HR and DE&amp;I professionals bring to light how organizations are increasing productivity and assisting their employees with managing career goals in a more diverse and hybrid work environment.</p>	<p><b>Panelist:</b> Henri Cancio- Fitzgerald, Managing Director of Nonprofit Solutions, PNC Bank</p> <p><b>Panelist:</b> Dominique Harris, Associate Partner, Leadership, Change, and Organization, Kearney</p> <p><b>Panelist:</b> Samantha Grant, Senior Consultant, Verus Investments</p>		
12:00 PM - 12:15 PM	Program Break			
12:15 PM - 1:30 PM	<b>Lunch Plenary Session</b>	<p><b>Greetings:</b> Congresswoman Nikema Williams, United States House of Representatives (D-GA)</p> <p><b>Keynote:</b> Melissa Conyears-Ervin, Treasurer, City of Chicago</p> <p><b>Matchplicity Platform Presentation:</b> Lauren Burke, Founder, Matchplicity</p>	<p>Plenary</p> <p><b>Atlantic Ballroom</b></p>	
1:30 PM - 1:45 PM	Program Break			
1:45 PM - 2:30 PM	<p><b>Climate Finance and ESG Investing for a Green Future</b></p> <p>As global actors advance ambitions to be net-zero by 2050 and to keep global warming to 1.5 degrees, developing economies face the challenges of building</p>	<p><b>Introduction:</b> Makole Mupita, Fund Principal, Executive Director and Co-Founder, Mahlako Financial Services</p>	<p>Africa and Emerging Markets Summit</p> <p><b>Pacific Ballroom 1-3</b></p>	



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	<p>low emission economies while being disproportionately affected by the physical risks of climate change. As such, the need for private capital to support the development of a low-carbon future and catalyzing economic growth at the same time will be crucial. This panel will discuss the current and future status of climate finance and investment models to support the green transition and the role of ESG investing more broadly. The discussion will explore the role of allocators, fund managers, corporates in investing in and meeting net-zero targets and how private actors can mitigate risk and enhance returns in the context of climate action.</p>	<p><b>Moderator:</b> Tariye Gbadegesin, Managing Director and Chief Executive Officer</p> <p><b>Panelist:</b> Hazel Taylor, Director and Head of Investor Desk, British International Investment</p> <p><b>Panelist:</b> Alissa Howard, Institutional Portfolio Manager, RBC</p> <p><b>Panelist:</b> Lazaro Tiant, Sustainability Investment Director for ESG, Schroders</p>		
<p>1:45 PM – 2:40 PM</p>	<p><b><i>Asset Allocation: The Value of Traditional Assets in the Age of Alternatives</i></b></p> <p>Over the past several years, Institutional investors have increased their allocation to alternative investments such as Private Equity, Infrastructure, Real Estate &amp; Hedge Funds. Although exposure to alternatives and private markets are good strategies to add alpha to the portfolio, investors must remember there is always a role for traditional equity and fixed income assets. This session will highlight the</p>	<p><b>Moderator:</b> Lisa Hinds, Managing Director, Client Engagement &amp; Sustainability, Xponance</p> <p><b>Instructor:</b> Gautam Khanna, CFA, CPA, Head of US Multi-Sector Fixed Income, Insight Investment</p> <p><b>Instructor:</b> Kristin Finney-Cooke, Managing Director, JP Morgan</p>	<p>The NASP Institute</p> <p><b>Adriatic/Aegean</b></p>	



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	ever-present need for traditional fixed income and equities in any asset allocation strategy.	<b>Instructor:</b> Lowell Yura, Head, Head, Multi-Asset Solutions, North America, T. Rowe Price		
1:45 PM – 2:30 PM	<p><b><i>The Making of Angels: Where Rising Stars Meet Entrepreneurs</i></b></p> <p>The role of angel investors is critical to the continued success and evolution of the start-up community. Sourcing early-stage capital can be the difference between early-stage success or failure. Innovative solutions to access capital for black and women entrepreneurs through connectivity diverse professional networks can truly lead to generational wealth accumulation within these communities.</p> <p>Come join us as founders and early-stage investors discuss how best to engage and support diverse founders as they look to create value and extend wealth generating opportunities.</p>	<p><b>Moderator:</b> Blair Smith, Senior Director, Center for Financial Markets, The Milken Institute</p> <p><b>Panelist:</b> Nicholas Antoine, Managing Partner, Red Arts Capital</p> <p><b>Panelist:</b> Melanie Seymour, Director, Capital Access, Institute For Entrepreneurial Leadership</p> <p><b>Panelist:</b> Shayna Harris, Managing Partner, Supply Change</p>	<p>Professional Development Series</p> <p><b>Baltic/Bering</b></p>	
2:30 PM – 2:40 PM	Program Break			
2:40 PM – 3:25 PM	<b><i>Venture Capital</i></b>	<b>Introduction:</b> Adewale Tinubu, Group Chief Executive, Oando PLC		





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	<p>Venture capital is an important source of funding to accelerate early-stage start-ups, and entrepreneurs. Increasing amounts of capital are going to emerging markets venture space driven by fintech, tech-enabled business models and the potential to scale solutions leveraging technology. These companies are driving innovation that facilitates economic development, poverty reduction, and job creation. Africa and other emerging markets with the combination of a growing consumer base, external inflows of investment, and entrepreneurial business solutions to addressing African consumer needs and business models which resolve structural problems has accelerated VC investments to record highs. This panel will assess the opportunity, challenges and sustainability of this asset class for emerging markets and how these investments can serve as conduit for international capital to generate outsized returns.</p>	<p><b>Moderator:</b> Richard Okello, Co-Founder, Sango Capital</p> <p><b>Panelist:</b> Daniel Rhoads, Client Director, Schroder Capital</p> <p><b>Panelist:</b> Ike Kanu, Partner, Atlantica Ventures VC Fund</p>	<p>Africa and Emerging Markets Summit</p> <p><b>Pacific Ballroom 1-3</b></p>	
<p>2:40 PM - 3:35 PM</p>	<p><b><i>Portfolio Protection Strategies: Best Practices for Securities Litigation &amp; Portfolio Monitoring</i></b></p> <p>Securities fraud is on the rise and Institutional investors must be proactive in protecting investments from fraud, market manipulation, or breach of contracts. This session will present the merits of</p>	<p><b>Instructor:</b> Marlon Kimpson, Member, Motley Rice, LLC</p> <p><b>Instructor:</b> Kweku Obed, CFA, CAIA, Managing Director, Marquette Associates</p>	<p>The NASP Institute</p> <p><b>Adriatic/Aegean</b></p>	



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	portfolio monitoring and the elements of securities fraud cases. The session will end with a brief overview of pension fund governance and the fiduciary responsibilities of fund trustees.			
2:40 PM - 3:25 PM	<p><b><i>The Growth of ESG Integration and the Demand for Critical Data</i></b></p> <p>As ESG continues to gain momentum, many companies are looking for ways to measure impact and hold themselves, as well as their vendors and partner firms accountable. Join us as ESG professionals discuss best practices of implementing ESG and the benefits of ESG and how it can positively influence investment decisions.</p> <p>We will discuss questions such as: What are global, as well as US, ESG trends? What capital market structures represent the best vehicle for ESG focused investments? And much more</p>	<p><b>Moderator:</b> Wayne Seaton, Managing Director, EY</p> <p><b>Panelist:</b> Meg Starr, Head of Global Impact, Carlyle Group</p> <p><b>Panelist:</b> Brooke Guven, Head of ESG &amp; Sustainability and Managing Director, Cerberus Capital Management</p> <p><b>Panelist:</b> Allison Norman, Vice-President, ESG Product Manager, State Street</p> <p><b>Panelist:</b> Erika Balbuena, Head of Environmental, Social &amp; Governance, Robinhood</p>	<p>Professional Development Series</p> <p><b>Baltic/Bering</b></p>	
3:25 PM - 3:35 PM	Program Break			
3:35 PM - 4:35 PM	<p>Afternoon Plenary Session</p> <p><b><i>A Roadmap to Ensure Black, Women-Owned &amp; Latinx Firms Proliferate</i></b></p> <p>Public and private sectors alike are eager to implement lasting diversity, equity, and inclusion initiatives because it makes good public policy and</p>	<p><b>Moderator:</b> Guy Logan, Managing Director, Citi, NASP Immediate Past Board Chair</p> <p><b>Panelist:</b> Shawn T. Wooden, Treasurer, State of Connecticut</p>	<p>Plenary</p> <p><b>Atlantic Ballroom</b></p>	



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	<p>economically beneficial. Earlier this year Citi established the Diverse Financial Institutions Group to expand firm-wide engagement with Minority Depository Institutions, Diverse Broker Dealers, and Diverse Asset Managers to work collaboratively with these firms so they can prosper and grow. This panel will explore how the public and private sector can work to ensure that Black, Women-Owned, Latinx and other minority firms proliferate in the coming years.</p>	<p><b>Panelist:</b> Phillip Washington, Chief Executive Officer, Denver International Airport</p> <p><b>Panelist:</b> Colin Ryan, Head of Broker Dealer &amp; Asset Manager Engagement, Diverse Financial Institutions Group, Citi</p>		
3:35 PM - 4:35 PM	<b>Speed Networking</b>		<p>Africa Emerging Markets Summit</p> <p><b>Caribbean Ballroom</b></p>	
4:45 PM - 6:00 PM	<b>Welcome Reception</b> - <i>Sponsored by Cabrera Capital</i>		<b>Atlantic Foyer</b>	



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Date: Tuesday; June 28, 2022 ALL TIMES CENTRAL				
Time	Session Title / Description	Speaker(s)	Track	Session Champion/ Co-Chair
8:30 AM-9:30 AM	<p>Morning Plenary Session</p> <p><b><i>The Future Of Asset Management</i></b></p> <p>The asset management industry evolves in response to investor needs, demography and demands. The pandemic has hastened some area of advancement like technology in distribution and customer service. What do you see as the challenges to be successful in asset management over the next 5-10 years? Will demands for thematic investing increase? Can success be possible without retail strategies and products? What pressures will technology like AI, automation put on current business models and investment processes?</p> <p>Surveys indicate areas like brand strategy, product strategy, sales &amp; distribution and investment operations are critical components for success in the future, but how and when do you allocate resources and attention towards these to strengthen your firm's competitive position? What do you see as the largest threat/opportunity in the next 5 years?</p>	<p><b>Moderator:</b> Jasmine Richards, CFA, Managing Director, Head of Diverse Research, Cambridge Associates</p> <p><b>Panelist:</b> Gabriel Rodriguez, Managing Partner, Empiric Institutional</p> <p><b>Panelist:</b> Floyd Simpson CFA, CAIA, CFP, Director, Portfolio Strategist, PFM Asset Management</p> <p><b>Panelist:</b> Dan Farley, Chief Investment Officer, Investment Solutions, State Street</p> <p><b>Panelist:</b> Malik Murray, SVP, Head of Business Development, Institutional Marketing, Ariel</p>	<p>Plenary</p> <p><b>Atlantic Ballroom</b></p>	
9:30 AM -9:45 AM	Program Break			



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<p>9:45 AM -10:30 AM</p>	<p><b><i>Municipal Finance [Post] Pandemic</i></b></p> <p>As the pandemic continues to evolve, hear from an array of high-profile municipal issuers from around the country, on how they have navigated the past twenty-four months and what lies ahead for them from a budgeting, operating, and credit, perspective. In addition, they will advise of their capital plans in the near term. These issuers have a long-demonstrated history of supporting diversity, equity, and inclusion.</p>	<p><b>Moderator:</b> Emily Wadhvani, Senior Director, US Public Finance, Fitch Ratings</p> <p><b>Panelist:</b> Reuben McDaniel,III President and Chief Executive Officer, DASNY</p> <p><b>Panelist:</b> Richard C. Dreher, Chief Financial Officer, Pennsylvania Turnpike Commission</p> <p><b>Panelist:</b> Jacqueline Knights,Director of Debt Management, Oregon State Treasury</p>	<p>Municipal <b>Adriatic/Aegean</b></p>	
<p>9:45 AM -10:30 AM</p>	<p><b><i>Digital Disruption: A Closer Look at Blockchain and Its Impact from Cryptocurrencies and Non-fungible Tokens (NFTs) to Decentralized Autonomous Organizations (DAOs)</i></b></p> <p>The panel will provide insights on how Cryptocurrencies and NFTs have evolved and the implications for the current markets. We will discuss the outlook of a decentralized world and the future of finance with Blockchain and Cryptocurrencies as a major asset. Finally, we will discuss the merits for</p>	<p><b>Moderator:</b> Reggie Scantlebury, Senior Managing Director, Equity Capital Markets, Institutional Sales, Stern Brothers</p> <p><b>Panelist:</b> E. David Ellington, Founder and Executive Director, Silicon Valley Blockchain Society</p> <p><b>Panelist:</b> David Weisberger, Co-founder, CoinRoutes</p>	<p>Institutional <b>Pacific Ballroom 1 - 3</b></p>	



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	exposure to Cryptocurrencies and NFTs from an investment perspective.	<b>Panelist:</b> Sean McGovern, Analyst, Stern Brothers		
9:45 AM -10:30 AM	<p><b><i>Diversity in wealth management: Are there lucrative Career Opportunities for young professionals and career changers in wealth management?</i></b></p> <p>Despite the obvious legacy of systemic racism in the financial sector, the current moment provides reasons for some hope that things may change for the better. Most wealth management professionals have extremely lucrative careers but the attraction of more young people of diverse backgrounds to the profession still hasn't taken root. What can WM Firms and organizations supporting the industry do to increase diverse representation in the industry.</p>	<p><b>Moderator:</b> Adam Rouse, Vice President - Defined Contribution Specialist, T, Rowe Price</p> <p><b>Panelist:</b> Monica Handy, Vice-President, Business Services Officer, Morgan Stanley</p> <p><b>Panelist:</b> Lattisha Jackson, Director, Administrative Services, Association of African-American Financial Advisors</p> <p><b>Panelist:</b> Barbara Withers, Managing Director, Nuveen</p> <p><b>Panelist:</b> Cliff Virgin, Senior Vice President, RBC Wealth Management</p>	<p>Wealth Management</p> <p><b>Baltic/Bering</b></p>	
10:30 AM -10:45 AM	Break			
10:45 AM-11:30 AM	<b><i>Developing Critical Infrastructure in the Metropolis</i></b>	<b>Moderator:</b> Steven Benjamin, Mayor (Former), Columbia, South Carolina	<p>Municipal</p> <p><b>Adriatic/Aegean</b></p>	



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	<p>Mayors make strategic decisions regarding the maintenance and development of critical infrastructure to promote the welfare of their cities. Their priorities shape metropolitan growth, economic development and regional prosperity. Mayors will discuss their practical experience addressing the fiscal opportunities and challenges in their region.</p>	<p><b>Panelist:</b> Steven Reed, Mayor, Montgomery, AL</p>		
<p>10:45 AM-11:30 AM</p>	<p><b><i>Venture Capital – Transformational, Trendy, or Both?</i></b></p> <p>There’s a lot of buzz about Venture Capital (VC) and technology investing. According to Pitchbook, global VC fundraising reached \$213.3 billion across 1,512 venture funds in 2021. This was a 14.1% YoY increase. Why is VC important for institutional investors? Where do Black and other diverse investors fit in venture capital? How can VC maximize the impact the ecosystem of Black and diverse founders?</p>	<p><b>Moderator:</b> Marcella Freeman, Florida A &amp; M Endowment, Former Trustee, Montgomery County (MD) Public Schools</p> <p><b>Panelist:</b> Tracy Gray, Founder and Managing Partner, The 22 Fund</p> <p><b>Panelist:</b> Joe Aguilar, Chief Investment Officer, Illinois State Treasurer</p> <p><b>Panelist:</b> Frederik Groce, Deal Lead, Wellington Access Ventures</p> <p><b>Panelist:</b> Lo Toney, Founding Managing Partner, Plexo Capital</p>	<p>Institutional <b>Pacific Ballroom</b> <b>1 - 3</b></p>	



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10:45 AM-11:30 AM	<p><b><i>Diversity in the C-Suite: How Some Wealth Management Firms Have Created Inclusive Environments that Allow Diverse Employees to Advance</i></b></p> <p>The business case for diversity, equity and inclusion (DE&amp;I) is stronger than ever. Taking a closer look at diversity winners reveals what can drive real progress.</p> <p>A McKinsey &amp; Co. 2019 analysis finds that companies in the top quartile for gender diversity on executive teams were 25 percent more likely to have above-average profitability than companies in the fourth quartile—up from 21% in 2017 and 15% in 2014.</p>	<p><b>Moderator:</b> Troy MooYoung, Executive Director, Complex Manager, Morgan Stanley</p> <p><b>Panelist:</b> Marlon Hall, Founder, Association for Wholesaling Diversity</p> <p><b>Panelist:</b> Justin Sullivan, Senior Vice President, Market Leader, PNC Bank</p> <p><b>Panelist:</b> Byna Elliot, Managing Director, Global Head of Advancing Black Pathways, JP Morgan</p> <p><b>Panelist:</b> Erica Seremeta, Global Director of DEI Client Engagement, Blackrock</p>	Wealth Management <b>Baltic/Bering</b>	
11:30 AM - 11:45 AM	Program Break			
11:45 AM - 1:15 PM	<p>Afternoon Plenary  <b><i>Joyce Johnson Luncheon</i></b></p> <p>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.</p>	<p><b>Keynote Speaker:</b> Rosalind Brewer, CEO, Walgreens Boots Alliance</p> <p>Award Presentation - Joyce Johnson Award          Joyce Beatty, US House of Representatives (D-Ohio)</p>	Plenary <b>Atlantic Ballroom</b>	





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	The luncheon honors the awardee of the honor. This year's Joyce Johnson award winner is Joyce Beatty, Representative, US House of Representatives (D-Ohio).	<b>Presentation:</b> Erica Miles, Senior Consultant, Senior Vice-President: Diverse Segments, Representation, and Inclusion, Wells Fargo		
1:15 PM - 1:30 PM	Program Break			
1:30 PM - 2:15 PM	<p><b><i>Environmental, Social, and Governance (ESG) Financing: Water and Sewer Bonds</i></b></p> <p>The social mission of water and sewer systems is related to their environmental mission. Water and sewer systems are committed to environmental safety while providing affordable service. Water and sewer financings are especially strong candidates for inclusion in Environmental, Social and Governance (ESG)-sensitive strategies for investors. Panelists will discuss ESG considerations for water and sewer system financings and market participants' perceptions of ESG bonds.</p>	<p><b>Moderator:</b> Camille M. Evans, Managing Partner, Virtus LLP, NASP Board Member</p> <p><b>Panelist:</b> Lisa Marie Harris, Finance Director/Treasurer, San Diego County Water Authority</p> <p><b>Panelist:</b> Chris Meister, Executive Director, Illinois Finance Authority</p> <p><b>Panelist:</b> Kim Dubuclet, Commissioner, Water Reclamation District, Greater Chicago</p>	Municipal <b>Adriatic/Aegean</b>	



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1:30 PM – 2:15 PM	<p><b><i>Understanding the Various Private Credit Asset Class Strategies</i></b></p> <p>This session will discuss the relevance of the Private Credit asset class for investors seeking higher yielding Fixed Income assets. Once a less defined and prevalent asset class, Private Credit has grown as a method of increasing yield in fixed income portfolios during the protracted low-rate interest rate environment of the past 14 years since the Great Financial Crisis. This panel seeks to provide the trends, risks, and opportunities for Private Credit as the market experiences an inflection point in the interest rate cycle to higher rates.</p>	<p><b>Moderator:</b> Joe Duncan, Senior Investment Officer, Illinois State Universities Retirement System</p> <p><b>Panelist:</b> Stephen Usher, Managing Director – Head of Distribution, Lafayette Square</p> <p><b>Panelist:</b> Vincent Thompson, Partner, Three Line Capital</p> <p><b>Panelist:</b> Sherrese Clarke Soares, Founder, HarborView</p> <p><b>Panelist:</b> Donna Sims Wilson, Chief Operating Officer, KAH Capital</p>	<p>Institutional</p> <p><b>Pacific Ballroom 1 - 3</b></p>	
1:30 PM – 2:15 PM	<p><b><i>Closing the Racial Wealth Gap: Enhancing Economic Inclusion Through Expanded Financial Access</i></b></p> <p>It is estimated that its dampening effect on consumption and investment will cost the US economy between \$1 trillion and \$1.5 trillion between 2019 and 2028—4 to 6 percent of the projected GDP in 2028.</p> <p>The widening racial wealth gap disadvantages black families, individuals, and communities and limits black</p>	<p><b>Moderator:</b> Christian Nwasike, Principal &amp; Executive Managing Partner, Practice Management Consultants, LLC</p> <p><b>Panelist:</b> Ladell Robbins, Managing Director, Blackrock</p>	<p>Wealth Management</p> <p><b>Baltic/Bering</b></p>	



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	<p>citizens' economic power and prospects, and the effects are cyclical. Such a gap contributes to intergenerational economic precariousness: almost 70 percent of middle-class black children are likely to fall out of the middle class as adults.</p>	<p><b>Panelist:</b> Greg Robinson, Senior Director, Market Intelligence, Moody's Analytics</p> <p><b>Panelist:</b> Kathleen Colin, Director of Investments, Oppenheimer</p>		
2:15 PM – 2:30 PM	Program Break			
2:30 PM – 3:15 PM	<p><b><i>What's Next On the Runway to Recovery for the Nation's Airports?</i></b></p> <p>The impacts of the coronavirus pandemic and subsequent travel restrictions on the airline industry caused total enplanements in [2020-21] to reach a level that had not been seen since 1997. Given the loss in revenues and uncertain future, many airports decided to forego or halt planned capital projects, deciding to wait to complete the projects until there is proof that the return to normalcy is on the horizon. This panel will discuss how airports have put their federal funds to use, how they are approaching capital planning given such uncertainty, and how construction plans have been impacted by higher costs and worker shortages</p>	<p><b>Moderator:</b> Bill Case, Managing Director, PFM Financial Advisors</p> <p><b>Panelist;</b> Atif Saeed, AAE, IAP, CHief Financial Officer, Metropolitan Airports Commission</p> <p><b>Panelist:</b> Reshma Soni, City Comptroller, City of Chicago</p> <p><b>Panelist:</b> Lori Small, Director, Airport Group, Citi</p>	<p>Municipal <b>Adriatic/Aegean</b></p>	



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<p>2:30 PM – 3:15 PM</p>	<p><b><i>Real Assets 2.0: From Energy Transition to Digital Infrastructure</i></b></p> <p>As markets have been roiled by persistent inflation, pandemic-driven uncertainty in real estate, and a \$16 trillion infrastructure funding gap, many investors have turned to real assets to provide stability and certainty to their portfolios. This panel will explore how investments in real assets have also been a means to create change, including creating affordable housing, expanding renewables, developing smart cities, and working with diverse managers.</p>	<p><b>Moderator:</b> James Celestine, Senior Investment Officer, New York State Common Retirement Fund</p> <p><b>Panelist:</b> Akhil Unni, Managing Director, GCM Grosvenor</p> <p><b>Panelist:</b> Chris Leslie, Senior Managing Director, Macquarie</p> <p><b>Panelist:</b> Reynold Martin, Managing Principal, Infrastructure and Energy ,Allstate</p> <p><b>Panelist:</b> Avery Robinson, Senior Vice-President, Real Assets Consulting Group, Callan</p> <p><b>Panelist:</b> Henry Willans, Vice-President, Goldman Sachs Asset Management</p>	<p>Institutional</p> <p><b>Pacific Ballroom 1 - 3</b></p>	
<p>2:30 PM – 3:15 PM</p>	<p><b><i>FinTech Panel Discussion: How New Technologies are Disrupting Traditional Wealth Management</i></b></p> <p>The rapid and ongoing innovations in technology are exciting. While the robo-advisor craze is well documented, the proliferation of artificial intelligence</p>	<p><b>Moderator:</b> Christian Nwasike, Principal &amp; Executive Managing Partner, Practice Management Consultants, LLC</p>	<p>Wealth Management</p> <p><b>Baltic/Bering</b></p>	



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	<p>(AI) tools hitting the wealth management landscape has made a dramatic entrance into the financial trade press.</p> <p>While it might be early, AI's role in financial advice is an area to watch. While some studies show that the number of financial advisors is expected to stay flat or grow moderately over the next five years, growth in assets managed by advisors shows that the industry is alive and well. The Registered Investment Advisor (RIA) Benchmarking Study from Charles Schwab shows that assets under management have increased steadily, with a five-year compound annual growth rate (CAGR) of 14.5% from 2015 to 2020.</p>	<p><b>Panelist:</b> Anthony Buchanan, Chief Executive Officer, LetBob</p> <p><b>Panelist:</b> Pavan Arora, Chief Technology Officer and Managing Director, Cerberus Technology Solutions, LLC</p> <p><b>Panelist:</b> Denzel Singletary, Federal Affairs, Robinhood</p>		
3:15 PM - 3:30 PM	Break			
3:30 PM - 4:30 PM	<p>Afternoon Plenary  <b>CIOs Speak</b></p> <p>Chief Investment Officers must take into account different investment horizons for different needs and incorporate a complex set of local and global factors into the investment decisions they oversee. Pandemics, global tensions, supply chains and labor markets are daily news. Listen to our panel of CIO's as they share their views of the capital markets and opportunities/challenges to their specific organizations' financial goals. What do they need from asset returns and managers now, have longer term investment strategies been altered or are there tactical</p>	<p><b>Moderator:</b> DeAnna Jones, Senior Consultant Specialist, NEPC</p> <p><b>Panelist:</b> Thomas Lee, Chief Investment Officer, New York State Teachers' Retirement System</p> <p><b>Panelist:</b> Leslie Lenzo, Chief Investment Officer, Advocate Aurora Health</p> <p><b>Panelist:</b> Nickol Hackett, Chief Investment Officer, Joyce Foundation</p>	<p>Plenary  <b>Atlantic Ballroom</b></p>	



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	adjustments to weather current storms? Where are they looking to increase/decrease exposures in terms of geographies and asset classes. What do they see as the economy's path over the next 18 months?	<b>Panelist:</b> Christopher Graham, Chief Investment Officer, Nationwide		
4:30 PM – 5:30 PM	<b>Career Coaching</b>		<b>Caribbean</b>	
6:30 PM – 7:30 PM	<b>Pre-Gala Reception - Sponsored by Loop Capital</b>	NASP Chapter Presidents Recognition  New England Chapter Introduction: Monet Ewing, Senior Fiduciary Officer, Independent Fiduciary Team, State Street	<b>Atlantic Foyer</b>	
7:30 PM – 9:30 PM	<b>International Gala and Award Presentation</b>	Emcee Intro - Renita Young, Host, Your Money Story/Black Business Beat, Bloomberg  Remarks and Sponsor Acknowledgements: Ronald C. Parker, NASP President & CEO  Remarks: Richard Turnley III, Director of Institutional Sales & Marketing, Channing Capital, NASP Board Chair, NASP Board Chair  Special Presentation #1 Presentation by: Richard Turnley III, Director of Institutional Sales &	<b>Plenary</b>  <b>Atlantic Ballroom</b>	



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		<p>Marketing, Channing Capital, NASP Board Chair</p> <p>Introduction of Reverend Jesse Jackson, Sr Anton Britton, Senior Vice-President, Private Capital, Northern Trust</p> <p>Special Presentation: Reverend Jesse Jackson, Sr.</p> <p>Young Professionals Award - Marques Highland, Director - Strategic Institutional Relationships, Diamond-Hill Capital Management</p> <p>Presentation: Farzin Khan, Vice-President, Account Manager, Wellington Management Company</p> <p>Travers Bell Award - Rodney Herenton, Founder, Co-Chief Executive Officer, Channing Capital Management</p> <p>Presentation: Shawn Lytle, Global Head MIM/ President, Delaware Funds/ Head of Americas, Macquarie Group</p>		
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		<p>Pacesetter Award –Angela Miller-May, Chief Investment Officer, Illinois Municipal Retirement Fund</p> <p>Presentation: Brian Collins, Executive Director, Illinois Municipal Retirement Fund</p> <p>Maynard Jackson Award – Art McClearin, Senior Managing Director, Marketing, Siebert, Williams, Shank and Co. LLC</p> <p>Presentation – Chris Williams, Chairman of the Board of Directors, Siebert, Williams, Shank, and Co. LLC</p> <p>Africa Awards Recognition Aymeric Saha, Chief Executive Officer, MiDA Advisors</p> <p>Dancing, Dessert, and Networking</p>		
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<b>Date: Wednesday; June 29, 2022 ALL TIMES CENTRAL</b>				
<b>Time</b>	<b>Session Title / Description</b>	<b>Speaker(s)</b>	<b>Track</b>	<b>Session Champion/ Co-Chair</b>
9:00 AM – 10:00 AM	Morning Plenary Session <b><i>The Future of NASP</i></b>  <b><i>Leading with a NEW Purpose: Fireside Chat</i></b>	<b>Speaker:</b> Ronald C. Parker, President & CEO, NASP <b>Speaker:</b> Richard Turnley, Channing Capital, NASP Board Chair  During this intimate chat, we will discuss the future of diversity in financial services. The session will touch upon the rise of Fintech, angel investing and entrepreneurship as avenues for diverse leaders. Additionally, we will explore retention and support for current diverse leaders in finance in the wake of the Great Resignation and changes wrought by the pandemic and calls for racial justice and equity.  <b>Speaker:</b> Shundrawn Thomas, Entrepreneur	Plenary  <b>Atlantic Ballroom</b>	



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		<p><b>Speaker:</b> Gwendolyn Hatten Butler, Managing Partner, Hatten Albert Strategic Advisors, LLC</p> <p><b>Speaker:</b> Ronald C. Parker, President &amp; CEO, NASP</p>		
10:00 AM -10:15 AM	Program Break			
10:15 AM – 11:15 AM	<p><b>Consultant Roundtable</b></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?</p> <p>Research or relationships, which comes first in the consultant chicken &amp; 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><b>Moderator:</b> McCullough “Mac” Williams, President, and Chief Operating Officer, Xponance</p> <p><b>Panelist:</b> Sam Austin, Partner, NEPC</p> <p><b>Panelist:</b> Brianne Weymouth, Senior Vice President, Fund Sponsor Consulting, Callan</p> <p><b>Panelist:</b> Shelly Heier, President, Verus Investments</p> <p><b>Panelist:</b> Kweku Obed,CFA, CAIA, Managing Director, Marquette Associates</p>	Plenary	<b>Atlantic Ballroom</b>



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	Are there successes/disappointments you would share as it relates to expanding diversity both in manager consideration and staffing over the last 3-5 years?			
	<b>Closing Remarks</b> Ronald C. Parker, NASP President and CEO			
11:15 AM – 12:30 PM	<b>Grab &amp; Go Lunch</b>			
	<b>Conference Ends</b>			