

CII Master Class: 31 Flavors of Stewardship

Monday, March 9, 2020

12:00 noon – 2:00 PM

Mandarin Oriental Hotel

1330 Maryland Avenue SW

Washington, D.C. 20024

Buffet lunch available starting at 11:45

Institutional Investors are known for taking a wide range of approaches to staffing, managing and executing various aspects of what is broadly categorized as stewardship. This two-hour supplemental session will explore that diversity, including differences between asset owners and asset managers, and differences between funds that predominantly use passive versus active strategies. We will further consider how this increasingly scrutinized aspect of fund management may evolve in the 20's.

Part I. Asset owner segment (12:00 – 12:45)

Kyle Seeley, New York State Common Retirement Fund

Luz Rodriguez, Colorado Public Employees Retirement System

Tara Stacy, Colorado Public Employees Retirement System

Moderator: Glenn Davis, CII

Part II. Asset management segment (12:55 – 2:00)

Tom Elliott, Capital Group

Catherine Moyer, Northern Trust

Jake Walko, Neuberger Berman

Moderator: Zach Oleksiuk, Evercore