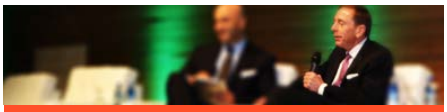
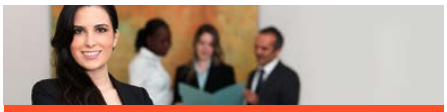
3RD ANNUAL TEXAS INSTITUTIONAL INVESTOR FORUM
Austin, TX | November 5, 2015



WHY ATTEND?

MORE INFO



WHY SPONSOR?

MORE INFO

SPEAKERS

Brian Guthrie
Executive Director
Teacher Retirement System of Texas

Porter Wilson
Executive Director
Employees Retirement System of Texas

Tom Tull
Chief Investment Officer
Employees Retirement System of Texas

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Sharmila Chatterjee Kassam
Deputy Chief Investment Officer
Employees Retirement System of Texas

Rhonda Smith
Executive Director
Houston Municipal Employees Pension System

Sherry Mose
Chairman
Houston Municipal Employees Pension System

James Hille
Chief Investment Officer
Texas Christian University

Chris Halaska
Chief Investment Officer
Memorial Hermann Health System

Leighton Shantz
Director of Fixed Income
Employees Retirement System of Texas

Bruce Ruehl
Head of Portfolio Advisory
Aksia

James Perry
Chief Investment Officer
Dallas Fire and Police

Jonathan Needle
Chief Legal Officer
Houston Firefighters' Relief and Retirement Fund

Josh Mond
Genereal Counsel
Dallas Police and Fire Pension System

Jeff Wallace
Senior Director of Operations
Baylor University Office of Investments

Tim Barron
Chief Investment Officer
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Registration is open to qualified plan sponsors and institutional investors only.

REGISTER

Robert C. Lee III
Director of Hedge Funds
Employees Retirement System of Texas

Mark Ruloff
Director of Asset Allocation
Towers Watson Investment Services

Timothy Smith
President, Upstream Oil & Gas Single Family Office
President & Chief Investment Officer, Petro Lucrum

REQUEST AGENDA

☑

Yes, I'd like to view the agenda.

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Key Discussion Topics Include:

- Smart Beta
- Pension Fund Management
- Private Equity Allocation Trends
- Fund Operational Issues
- Global Equity Market Landscape
- Hedge Fund Allocation Trends
- Asset Recovery and Securities Litigation
- Distressed Cycle and Credit Market Navigation
- Interest Rates and the Credit Cycle
- Real Assets and Non-Traditional Asset Classes
- Fiduciary Responsibility
- Fraud Protection

OVERVIEW

The 3rd Annual Texas Institutional Investor Forum is an educational initiative designed through close coordination with the region's leading institutional investors to build peer communities that merge global best practices with local expertise.

The program's agenda will cover smart beta, pension fund management, private equity allocation trends, real assets, fund operational isues, global equity market landscape, hedge fund allocation trends, asset recovery, securities litigation, distressed cycle and credit market navigation, interest rates and the credit cycle,

real assets and non-traditional asset classes, fiduciary responsibility, and fraud protection. The forum is specially designed to bring together 100+ staff members, investment officers, board members, trustees, and the institutional community in the state of Texas.

CPAs can receive CPE credits towards their continuing education obligations.

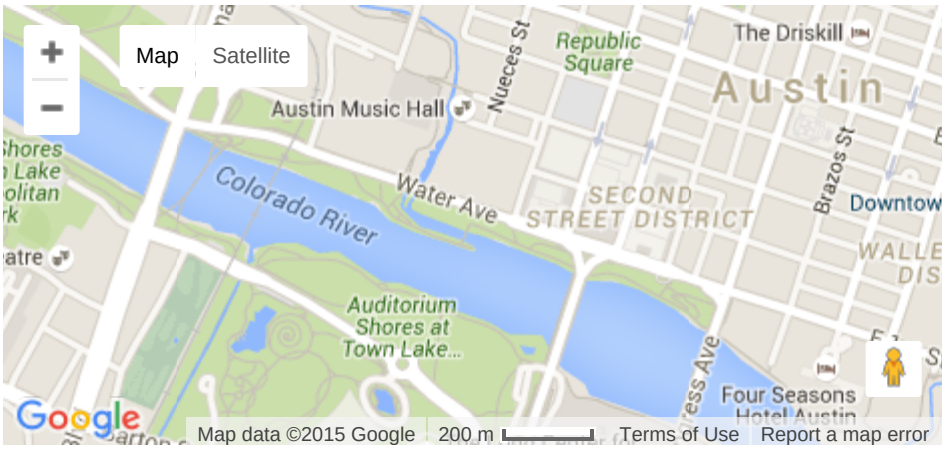
WHY ATTEND

Gain deep insight into the future of public pensions, corporate pensions, foundations, endowments, Taft Hartley, investment consulting, fiduciary responsibilities, insurance, hospital operating pools, securities litigation, ESG/responsible investing, smart beta, private equity, secondaries, and real assets.

Understand the impacts of legislation and regulatory changes. Consult with experts to understand the best course of action for your fund.

Network with your peers from Texas's leading plan sponsors, pension administrators, corporate treasurers, trustees, foundations, endowments, and investment consultants.

VENUE



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