

# 21<sup>st</sup> Annual Oklahoma Public Fund Trustee Education Conference

## Agenda September 27-29, 2017

Chickasaw Resort & Conference Center (CRCC)  
4205 Goddard Youth Camp Road, Sulphur, OK 73086

### Wednesday, September 27, 2017 Educational Sessions 3:00 pm to 5:00 pm

#### WEDNESDAY'S SESSIONS TO BE HELD AT CRCC, 2<sup>nd</sup> FLOOR

*Buses from the Artesian to CRCC will pick-up @ 1:30, 2:00 and 2:30 pm with availability upon request up to 10:00 pm to/from each location*

- 2:00 pm     **Registration** - CRCC Lobby
- 3:00 pm     **Session 1: Investment Basics – Investment Policy, Asset Allocation & Manager Evaluation/Review**  
*Speaker:* Haley Rives, CFA & Kevin Moore - Asset Consulting Group, LLC
- 3:45 pm     **Break**
- 4:00 pm     **Session 2: Understanding the Marriage of Assets & Liabilities in Your Plan**  
*Speaker:* Mark Gilje, CFA - Asset Consulting Group, LLC
- 5:00 pm     **Welcome Reception** - The Great Room at CRCC  
Hosted by Pioneer Investments
- 7:00 pm     **Dinner on your own**

*Buses from CRCC to the Artesian will pick-up @ 5:30, 6:00 and 6:30 pm with availability upon request up to 10:00 pm to/from each location*

### Thursday, September 28, 2017 Educational Sessions 8:30 am to 5:30 pm

#### THURSDAY'S SESSIONS TO BE HELD AT CRCC, 2<sup>nd</sup> FLOOR

*Buses from the Artesian to CRCC will pick-up @ 7:00, 7:30 and 8:00 am with availability upon request up to 10:00 pm to/from each location*

- 7:00 am - **Breakfast** - The Dining Room at CRCC  
8:30 am
- 8:00 am     **Registration** - CRCC Lobby
- 8:30 am     **OkMRF/Sulphur Welcome**
- 8:45 am     **Session 3: Global Economic Update**  
*Speaker:* Dan Phillips - The Northern Trust Company
- 9:30 am     **Break**
- 9:45 am     **Session 4: Behavioral Finance**  
*Speaker:* Simon Hallett - Harding Loevner LP
- 10:30 am    **Break**
- 10:45 am    **Session 5: National & Oklahoma Case Law Update**  
*Speaker:* Robert Klausner - Klausner, Kaufman, Jensen & Levinson

Public Fund Host:



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## Agenda September 27-29, 2017

### Thursday, September 28, 2017 (cont'd)

- 11:45 am **Lunch** - The Dining Room at CRCC
- 1:00 pm **Session 6: Environmental, Social & Governance (ESG) Investing**  
*Speaker:* Lori Mills, CFA - Asset Consulting Group, LLC
- 1:45 pm **Session 7: DB and DC Trends & Best Practices**  
*Speaker:* Brendan Curran, CFA & Thomas Kennelly - State Street Global Advisors
- 2:30 pm **Bedré Chocolate Break**  
Hosted by Voya Financial®
- 3:00 pm **Session 8: Evaluating Your Investment Consultant**  
*Speaker:* Sara Sikes - Greenwich Associates
- 3:45 pm **Break**
- 4:00 pm **Session 9: Living a Life Worth Living – An Ethical Framework for Everyday Life**  
*Speaker:* Mike Crawford, CPA - Crawford & Associates, P.C.
- 6:30 pm **Reception Banquet** - The Ball Room at the Artesian Hotel  
Background music with a concert following dinner by Edgar Cruz, Oklahoma's most versatile solo guitarist  
Hosted by State Street Global Advisors and JPMorgan Asset Management

*Buses from CRCC to the Artesian will pick-up @ 5:30 and 6:00 pm and return trips back to CRCC @ 8:30 and 9:00 with availability upon request up to 10:00 pm to/from each location*

### Friday, September 29, 2017 Educational Sessions 8:30 am to 11:30 am

#### FRIDAY'S SESSIONS TO BE HELD IN CRCC AMPHITHEATER, 1<sup>st</sup> FLOOR

*Buses from the Artesian to CRCC will pick-up @ 7:00, 7:30 and 8:00 am and return trip back to Artesian @ 11:30 am*

- 7:00 am - **Breakfast** - The Dining Room CRCC
- 8:30 am **Session 10: Cybersecurity**  
*Speaker:* Scott Klososky - Future Point of View
- 10:30 am **Break**
- 10:45 am **Session 11: Fixed Income Investing in a Rising Rate Environment**  
*Speaker:* Matt Toms, CFA – Voya Investment Management
- 11:30 am **Conference Wrap Up/Evaluations**

Public Fund Host:

