



**2014 LOFT  
INVESTORS  
FORUM**





# ABOUT OUR PROGRAM

The HHF Investors Forum is an initiative for Latino investors: trustees, investment staff, and asset managers. The Forum

1. provides educational content on investments and asset management best practices,
2. builds a diverse network of investors and asset managers, and
3. creates a pipeline of Latinos to grow into trustee and senior investment roles.

We started the HHF initiative in 2014 to fulfill the pillars from above.

## ABOUT HHF

The Hispanic Heritage Foundation – a nonprofit established by the White House in 1987 – inspires, prepares, and connects minority leaders in the classroom, community, and workforce to meet America’s priorities. HHF also promotes cultural pride, accomplishment, and the great promise of the community through public awareness campaigns seen by millions. HHF is headquartered in Washington, DC, and Los Angeles with satellite work spaces in New York, Silicon Valley, San Antonio, and Miami.





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The inaugural Investors Group conference proved a great success. Participants cited the valuable content and the meaningful relationships formed. The Forum was headlined by U.S. SEC Commissioner Luis Aguilar.



[U.S. SEC Commissioner Luis Aguilar's Keynote Remarks from the Inaugural HHF Investors Group Conference](#)

[Inaugural Investors Group Pictures](#)

# AGENDA

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## Friday, June 24

### Welcome Remarks

- Luis A. Aguilar, U.S. Securities and Exchange Commissioner
- Josh Gotbaum, Director, PBGC

### Personal Experiences of Trustees

- Ray Sanchez, Trustee, New York City Employees' Retirement System (Moderator)
- Nilza Serrano, Trustee, Los Angeles City Employees' Retirement System
- David Corpus, Trustee, Teacher's Retirement System of Texas
- Belinda Vega, Trustee, Los Angeles Fire and Police Pensions
- Nick Nuanes, Trustee, Fire and Police Pensions Association of Colorado
- Elisa Velazquez, Trustee, New York City Employees Retirement System
- Jerry Villanueva, Trustee, El Paso Firemen & Policemen's Pension Fund
- Marty Torres, Trustee, UAL-MEC Pilots Retirement & Insurance Committee
- Ruby Muñoz Dang, Trustee, Metropolitan Transit Authority of Harris County Non-Union Pension Plan & Trust

### Board Governance & Fiduciary Responsibilities

- Dr. Joe Guzman, Professor, Michigan State University (Moderator)
- Belinda M. Vega, Trustee, Los Angeles Fire and Police Pensions
- Jorge Rodriguez, Principal Consultant, ACA Compliance
- Jason Esteves, Trustee, Atlanta General Employees' Pension Fund
- Alvin Velazquez, Associate General Counsel, Service Employee's International Union Capital Stewardship Program

### General Asset Allocation & Risk Management

- Stacie-Olivares Castain, Managing Director, California Organized Investment Network (Moderator)
- Ruby Muñoz Dang, Trustee, Metropolitan Transit Authority of Harris County Non-Union Pension Plan & Trust
- Emanuel Pleitez, Trustee, Los Angeles Fire and Police Pensions
- Carmen Heredia-Lopez, CIO, Chicago Teachers' Pension Fund
- Dr. Arturo Gonzalez, Economist, Board of Governors of the Federal Reserve System
- Eli Martinez, Investment Officer, Santa Barbara County Employees' Retirement System
- Ignacio Canto, President & Director, X-Square Capital

### Lunch & Remarks

Gustavo Arnavat, Former U.S Executive Director, Inter-American Development Bank

**Friday, June 24****Private Markets**

- Mina Pacheco Nazemi, Partner, GCM-Grosvenor (Moderator)
- Juan Carlos Avila, Trustee, Policeman's Annuity & Benefit Fund of Chicago
- Juan Sabater, Managing Director, Valor Equity Partners
- Ingrid Mazul, Co-Founder & Partner, ClearPoint Investment Partners
- Jay Garcia, Managing Partner, Small Business Community Capital
- Javier Saade, Associate Administrator, Small Business Administration
- Gustavo Arberelli, Managing Director, Trident Capital

**Real Estate, Infrastructure & Energy**

- Ken Gurrola, CEO, Eastridge Capital (Moderator)
- J.T. Trevino, Trustee, Fire and Police Pension Fund of San Antonio
- Jim Lingberg, Secretary-Treasurer, EVP, AFL-CIO
- Victor Miramontes, Vice Chairman & Co-Founder, CityView
- Pamela Robertson, Partner, Squires Paton Boggs
- Marco Krapels, Partner, Pegasus Capital

**Specialized, Emerging, & Diverse Manager Programs**

- Tom Soto, Managing Director, TCW (Moderator)
- Solange Brooks, Portfolio Manager, California State Teachers' Retirement System
- Robert Greene Trustee, Virginia Retirement System
- Monika Mantilla, President & CEO, Altura Capital; Partner, Small Business Community Capital
- Nilza Serrano, Trustee, Los Angeles City Employees' Retirement System
- Greg Henry, Trustee & Member of the Investment Committee, Edison International

**Trustee Reflections & Next Steps****Reception & Keynote Remarks**

# OUR SPONSORS

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Eastridge Capital, LP

**Garcia Hamilton & Associates**

**Altura Capital**

**Adelante Capital Management**

**Crowell & Moring**

**ACA Compliance Group**

**Eastridge Capital, LP**



# THANK YOU



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