




# 2015 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.



# 2015 LOFT INVESTORS FORUM

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**June 23-24, 2015  
Los Angeles, California**

The 2015 annual conference, was extended to a two-day event in Los Angeles, where past and new participants convened to foster existing relationships and create new ones. The conference was headlined by Rosie Rios (Treasurer of the United States), John Chiang (Treasurer of California), Steve Westly (former Controller of California), and Antonio Villaraigosa (43rd Mayor of Los Angeles).



# AGENDA

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## Tuesday, June 23

### Welcome Remarks

- Dennis Fox, Director, LOFT Investors Forum
- Emanuel Pleitez, Chairman, Hispanic Heritage Foundation

### Keynote Remarks

- Rosie Rios, Treasurer of the United States

### Personal Experiences of Trustees in Driving Change

- Gilbert Garcia, Managing Partner, Garcia Hamilton & Associates (Moderator)
- Ruben Navarro, Trustee, Los Angeles Fire and Police Pensions
- Eraina Ortega, Trustee, California State Teachers' Retirement System
- Marty Torres, Trustee, United Pilots' Defined Contribution Plan
- Valerie Villareal, Trustee, Los Angeles County Employees' Retirement Association

### Board Governance & Fiduciary Responsibilities

- Dr. Joe Guzman, Professor, Michigan State University (Moderator)
- Felipe Arroyo, Partner, Robbins Arroyo LLP
- Herman Santos, Trustee, Los Angeles County Employees' Retirement Association
- Belinda Vega, Trustee, Los Angeles Fire and Police Pensions

### Macroeconomic Outlook

- Teresa McBride, CEO, McBride & Company (Moderator)
- Elizabeth Laderman, Senior Economist, San Francisco Federal Reserve

### Reception, Dinner, & Keynote Remarks

- Kayla Gillan, former General Counsel at California Public Employees' Retirement System; Leader, PwC Investor Resource Institute (Moderator)
- Travis Antoniono, Investment Officer, California State Teachers' Retirement System
- Dana Hollinger, Trustee, California Public Employees' Retirement System
- Luz Rodriguez, Director of Corporate Governance & Legal Services, Colorado Public Employees' Retirement Association

### Shareholder Activism

- Henry Cisneros, former U.S. Secretary, Department of Housing and Urban Development

**Friday, June 24****Asset Allocation & Risk Management**

- Tom Lopez, Chief Investment Officer, Los Angeles Fire & Police Pensions (Moderator)
- Robert Boada, Vice President & Treasurer, Edison International

**Equities**

- June Kim, Director of Global Equities, California State Teachers' Retirement System (Moderator)
- Juan Carlos Avila, Trustee, Chicago Policeman's Annuity & Benefit Fund
- Fernando Inzunza, Partner and Portfolio Manager, Lombardia Capital
- Rodney June, Chief Investment Officer, Los Angeles City Employees' Retirement System

**Fixed Income**

- Michelle Durgy, CIO, City of County of San Francisco (Moderator)
- Luis Maizel, Senior Managing Director, LM Capital Group
- Ruby Muñoz Dang, Trustee, Metropolitan Transit Authority of Harris County; Garcia Hamilton & Associates

**Real Estate and Real Assets**

- Ken Gurrola, CEO, Eastridge Capital (Moderator)
- Corinne Tapia, Trustee, Los Angeles Fire & Police Pensions
- Michael Torres, CEO, Adelante Capital

**Lunch & Keynote Remarks**

- Antonio Villaraigosa, 41st Mayor of Los Angeles
- John Chiang, Treasurer of California & Trustee, California Public Employees' Retirement System & California System Teachers' Retirement System

**Private Markets (Including Venture Capital)**

- Mina Pacheco Nazemi, Partner, GCM Grosvenor (Moderator)
- Gustavo Alberelli, Partner, Trident Capital
- Pawan Chaturvedi, Senior Investment Director, UCLA Investment Company
- Susan Lee, Head Private Markets Consultant, Angeles Investment Advisors
- Javier Saade, Associate Administrator, Small Business Administration

# AGENDA

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## Friday, June 24

### Hedge Funds

- Ray Sanchez, Trustee, New York City Employees Retirement System (Moderator)
- Diana Di Lorio, Senior Vice President, Grosvenor Capital Management

### Regional, Community, & Impact Investing

- Stacie Olivares Castain, Managing Director, California Organized Investors Network (Moderator)
- Monika Mantilla, CEO, Altura Capital; Partner, Small Business Community Capital
- Arthur Hidalgo, Managing Partner, Carpenter Community BancFund

### Specialized, Emerging, & Diverse Manager Programs

- Solange Fernandez Brooks, Portfolio Manager, California State Teachers' Retirement System (Moderator)
- Martin Cabrera, CEO, Cabrera Capital
- Cheryl Hines, Portfolio Manager, Teachers' Retirement System of Texas
- Laurie Weir, Senior Portfolio Manager, California Public Employees' Retirement System

### Trustee Reflections & Next Steps

- Moctesuma Esparza, Founder, Maya Cinemas (Moderator)
- Edgar Hernandez, Service Employees' International Union Capital Stewardship Program
- Nilza Serrano, Trustee, Los Angeles City Employees' Retirement System

### Reception (hors-d'oeuvre) & Closing Remarks

- Steve Westly, former Controller of California & Trustee at California Public Employees' Retirement System & California State Teachers' Retirement System; Managing Partner, The Westly Group

# OUR SPONSORS

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**Loyola Marymount University  
California State Teachers' Retirement  
System**

**GCM Grosvenor**

**Garcia Hamilton & Associates**

**Trident Capital**

**PwC**

**Robbins Arroyo**

**Altura Capital**

**Meruelo Group**

**Adelante Capital Management**

**LM Capital Group**

**Carpenter Company**

**Estancia Partners**



# THANK YOU



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