



**2016 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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**June 1-2, 2016
Los Angeles, CA**

The Hispanic Heritage Foundation (HHF) Investors Group Third Annual Conference was the largest Forum to date. Participants gave enthusiastic reviews and the Forum community continued to grow and flourish. The Forum was headlined by Gilbert Garcia, Anne Mathias, and Sylvia Bell.



AGENDA

05

Wednesday, June 1

Welcome Remarks

- Gilbert Garcia, CFA, Managing Partner, Garcia Hamilton & Associates

Keynote Remarks

- Rosie Rios, Treasurer of the United States

Personal Experiences of Trustees in Driving Change

- Belinda M. Vega, Trustee, Los Angeles Fire and Police Pensions (Moderator)
- Al Martinez, Trustee, Nevada Public Employees' Retirement System
- David Corpus, Trustee, Teachers' Retirement System of Texas
- Loretta Naranjo Lopez, Trustee, New Mexico Public Employees' Retirement Association
- Ruby Muñoz-Dang, Trustee, Metropolitan Transit Authority of Harris County Non-Union Pension Plan & Trust

Board Governance & Fiduciary Responsibilities

- Dr. Joseph Guzman, Professor, Michigan State University (Moderator)
- Belinda M. Vega, Trustee, Los Angeles Fire Police Pensions
- Cynthia Ruiz, Trustee, Los Angeles City Employees' Retirement System
- Dana Hollinger, Trustee, California Public Employees' Retirement System

Investing in Inclusion: Public & Private Sector Innovations

- Charles Spearman, Senior Managing Director, Guggenheim Partners (Moderator)
- Angela Guzman, Senior Manager of Supplier Diversity, Comcast NBC Universal
- Carra Wallace, Chief Diversity Officer, New York City Comptroller
- Kate Kleyman, Associate Office of Diversity and Inclusion, Guggenheim Partners
- Richard Kasnia, Senior Managing Director, Guggenheim Partners

Reception, Dinner, & Keynote Remarks

- Anne Mathias, CFA, Senior Managing Director and Macro Strategist, Guggenheim Partners

Thursday, June 2

Shareholder Activism

- Raymond Sanchez, Trustee, New York City Employees' Retirement System (Moderator)
- George C. Aguilar, Partner, Robbins Arroyo
- Luz Rodriguez, Director of Corporate Governance & Legal Services, Colorado Public Employees' Retirement Association
- Travis Antoniono, Investment Officer, California State Teachers' Retirement System

Thursday, June 2**Asset Allocation & Risk Management**

- Patrick Mitchell, Senior Managing Director and Senior Adviser to the Global Chief Investment Officer, Guggenheim Partners (Moderator)
- Geraldine Jimenez, Portfolio Manager, California State Teachers' Retirement System
- Monika Mantilla, President and CEO Altura Capital; Managing Partner, Small Business Community Capital, SBCC, and SBCI Impact Fund

Equities

- Nilza Serrano, Trustee, Los Angeles City Employees' Retirement System (Moderator)
- Fernando Inzunza, Partner and Portfolio Manager, Lombardia Capital Partners
- Jeff Garcia, Investment Analyst, Capital Group
- Jimmy Wang, Investment Officer, Los Angeles City Employees' Retirement System
- Patrick Mitchell, Senior Managing Director, Senior Advisor to the Global Chief Investment Officer, Guggenheim Partners

Fixed Income

- David Corpus, Trustee, Texas Teachers' Retirement System (Moderator)
- Kelechi Ogbunamiri, Vice President, Guggenheim Partners
- Mario Modiano, Senior Portfolio Manager, LM Capital, LLC

Lunch & Keynote Remarks

- Sylvia Bell, Managing Director, Teachers' Retirement System of Texas

Real Estate & Real Assets

- Ken Gurrola, Chairman and CEO, Eastridge Capital (Moderator)
- Martin Cabrera, Founder and Chief Executive Officer, Cabrera Capital Markets
- Peter Braffman, Managing Director, GCM Grosvenor
- Rob Lawrence, Senior Managing Director, Guggenheim Partners

Alternative Investments: Private Equity, Venture Capital & Hedge Funds

- Julie Fox, Analyst, Aldwych Capital (Moderator)
- James Mitchell, Managing Director, The Rock Creek Group
- Alex Guerrero, Associate, Act One Ventures
- Angel Saad Gomez, Venture Partner, OAK Investment Partners
- Edgar Hernandez, Service Employees' International Union
- Jimmy Wang, Investment Officer, Los Angeles City Employees' Retirement System
- Rami Reyes, Co-Founder and Principal, NextEquity Partners

AGENDA

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Thursday, June 2

Specialized, Emerging, & Diverse Manager Programs

- Perry Hollowell, Portfolio Manager, Guggenheim Partners (Moderator)
- Edgar Hernandez, Service Employees' International Union
- Michael Silva, Investment Officer, California Public Employees' Retirement System
- Sylvia Bell, Managing Director, Investment Operations, Texas Teachers' Retirement System

Regional, Community & Impact Investing

- Corinne Tapia Babcock, Trustee, Los Angeles Fire and Police
- Aurthur Hidalgo, Co-Founder & Partner, Carpenter Community BancFunds
- Marcos Gonzalez, Managing Partner, VamosVenture
- Tina Castro, CFA, Managing Partner and Co-Founder, Avivar Capital

Trustee Reflections & Next Step



OUR SPONSORS

08

GUGGENHEIM



ROCK CREEK



Eastridge Capital, LP

TITLE UNDERWRITER

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GCM Grosvenor

The Rock Creek Group

SUPPORTERS

Carpenter Company

LM Capital Group

Robbins Arroyo, LLP

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