



**2020 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.



# 2020 LOFT INVESTORS FORUM

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**June 10 - June 11, 2020**  
**Virtual**

The Hispanic Heritage Foundation Investors Forum hosted its Seventh Annual Conference this year. We gathered a network of experts and key stakeholders in the industry to share their expertise and provide educational training to Trustees.

JOIN US

**7TH ANNUAL**  
**Hispanic Heritage**  
**FOUNDATION**  
**INVESTORS FORUM**  
**JUNE 11TH, 2020 - VIRTUAL**

For more info visit: [www.loftinvestorsforum.org](http://www.loftinvestorsforum.org)

# AGENDA

05

**Wednesday, June 10, 2020**

## **Welcome Remarks**

- Antonio Tijerino, Hispanic Heritage Foundation
- Emcee: Martha Hernandez, CEO of madeBOS

## **Personal Experiences of Trustees in Driving Change**

- Eraina Ortega, Trustee at CalPERS
- Belinda Martinez Vega, Trustee at LAFPP
- Corinne Tapia-Babcock, Trustee at LAFPP
- Captain John Serda, Trustee at PFRS City of Detroit
- Tina Padilla, Trustee at CTPF

## **Opportunities in Real Estate and Real Assets**

- Corinne Tapia-Babcock, Trustee at LAFPP
- Sasha Bernier, Senior Vice President & Investment Committee Member at Cheltenham Investments
- Luis Sanchez, Senior Vice President at Adelante Capital Management
- André Bueno, Principal at Bueno Group
- Martin Cabrera, Founder & Chief Executive Officer, Cabrera Capital
- Eren Shultz, Portfolio Manager, Westchester, a TIAA company
- Marco A. Soriano, Partner and Chief Investment Officer, The Soriano Group & Family Office

## **Investing in the Private Markets**

- Henry Jones, Board Member at CalPERS
- Al Hemmingsen, Chief Investment Officer at Parkland Management Company
- Dana Johns, Senior Portfolio Manager at Maryland SRA
- Rekha Unnithan, Managing Director at Nuveen
- Joncarlo Mark, Founder at Upwelling Capital Group
- Timothy A. Reese, Founder and CEO at Forge Intellectual Capital, Former Pennsylvania State Treasurer
- Kevin J. Aguas, Principal Business Analyst at NAU

## **Emerging and Specialized Manager Programs**

- Ophelia Basgal, Board Member at ACERA
- Arthur R. Guimaraes, Chief Operating Officer at UC Investments
- Caroline Greer, Chairperson at Commomfund Diversity and Inclusion Office
- Israel Muñoz, Investment Analyst at Illinois State Treasurer
- Robert Raben, President and Founder at The Raben Group, Diverse Asset Manager Initiative

**Thursday, June 11, 2020**

**Welcome Remarks**

- Jose Antonio Tijerino, Hispanic Heritage Foundation
- Emcee: Martha Hernandez, CEO of madeBOS

**Understanding Institutional Asset Allocation**

- Janet Cowell, CEO at Girls Who Invest, Former North Carolina State Treasurer
- David Villa, Executive Director/Chief Investment Officer at State of Wisconsin Investment Board
- Thomas Clancy, Chief Investment Officer at Pennsylvania Treasury
- Jesús Argüelles, Director of Investments at the James Irvine Foundation
- Scott Chan, Deputy Chief Investment Officer at CalSTRS
- Robert Sinclair, Chief Investment Officer, Private Family Office

**Keynote**

- Fireside chat with Jose Minaya, CEO, Nuveen, a TIAA Company
- Moderated by Stacie Olivares-Castain, Board Member CalPERS



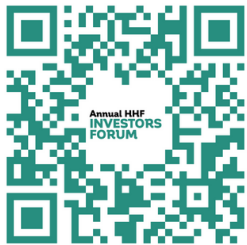
# VIRTUAL RECORDINGS

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## **7th Annual HHF Investors Forum - Day 1 June 10, 2020**

**Scan the code or go to:  
[hhflink.org/3vRliao](https://hhflink.org/3vRliao)**



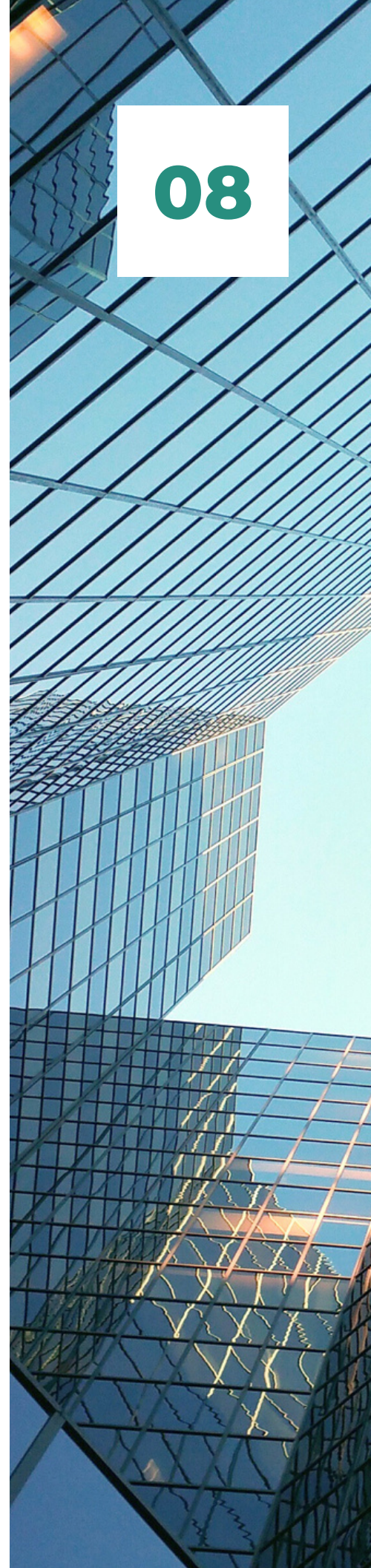
## **7th Annual HHF Investors Forum - Day 2 June 11, 2020**

**Scan the code or go to:  
[hhflink.org/47FWqB6](https://hhflink.org/47FWqB6)**



# OUR SPONSORS

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# THANK YOU



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