



FEFO

West Michigan Foundation Endowments & Family Offices Spring Seminar

Seminar Topic

International Equity Allocation: Overcoming Home Country Bias

Friday, May 8, 2015

8 am – 12pm

L. William Seidman Center, GVSU Pew Grand Rapids Campus

Recently, some U. S. investors have started to focus on international and emerging markets because of the growing global economy and potentially higher investment returns. According to the IMF's April 2014 "World Economic Outlook" analysis, the emerging market's share of global GDP hit 50.4% in 2013 laying the foundation for greater international growth for years to come. However, for many U.S. investors, the thought of investing outside of their country is outside of their comfort zone. Please join West Michigan FEFO ("Foundation, Endowment & Family Offices") for an overview of international investing. A panel of international investment experts will discuss the opportunities and challenges, asset allocation models, international investment anchors, volatility, currency, due diligence, and risk mitigation followed by a question and answer period.

FEATURING



PRADEEP RAMAMURTHY



Managing Director of The Abraaj Group



RUBIN MATTHEW



Director of Investment Strategy at Neuberger Berman and Chief Investment Officer (CIO)-Neuberger Berman Trust Company N.A.



JEFFREY GOLDENBERG



Director of Portfolio Strategy for the Private Wealth Management (PWM) Group- Goldman Sachs



KATHLEEN VOGELSANG



Chief Investment Officer at the Van Andel Institute



JAMES DONALD



Portfolio Manager/Analyst on the Emerging Markets Equity team and Head of the Emerging Markets Group- Lazard Asset Management LLC (New York)

Schedule

8:00a-8:30a

Breakfast

8:30a-8:35a

Master of Ceremonies

Richard Noreen, Partner-BDO

8:35a-8:45a

Welcome Remarks

Jim Brooks, Brooks Capital Management

8:45a-9:05a

Topic Overview

Jeff Goldenberg, Goldman Sachs

9:05a-10:15a

Panel Presentation

Fixed Income: Matt Rubin, Neuberger Berman Trust Company N.A.

Public Equity: James Donald, Lazard Asset Management LLC

Private Equity: Pradeep Pamamurthy, The Abraai Group

10:15a-10:45a

Networking Break

10:45a-11:00a

Investor Perspective: Choosing the Right Jockey

Kathleen Vogelsang, The Van Andel Institute

11:00a-12:00pm

Panel Discussion with Q&A

FEFO Speakers

James Donald	CFA-Managing Director, Portfolio Manager/Analyst Lazard Asset Management LLC (New York)
Jeffrey B. Goldenberg	Director of Portfolio Strategy for the Private Wealth Management (PWM), Goldman Sachs
Pradeep Ramamurthy	Managing Director, the Abraaj Group
Matthew Rubin	Managing Director, Director of Investment Strategy, Chief Investment Officer of Neuberger Berman Trust Company N.A.
Kathleen Vogelsang	Chief Investment Officer at the Van Andel Institute

FEFO Steering Committee

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Kathleen Vogelsang	Van Andel Institute
Kevin McCurren	Grand Valley State University, Richard M. and Helen DeVos Center for Entrepreneurship & Innovation
Shorouq Almallah	Grand Valley State University, Richard M. and Helen DeVos Center for Entrepreneurship & Innovation
Joseph Horak	Grand Valley State University, Family Owned Business Institute

Registration

\$50 Registration Fee

<https://events.blackbirdsvp.com/fefo-15>

