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NOTES

FEFO
Foundations Endowments Family Offices

Active vs. Passive Investing: Opportunities, Risks and Trends

Friday, December 8th, 2017
8:30AM-12:00PM
Eberhard Center
Grand Valley State University
301 Fulton SE, 2nd Floor

SEIDMAN | GRAND VALLEY STATE UNIVERSITY

Family Owned Business Institute

AGENDA

8:30a **Registration and Networking**
Continental Breakfast will be served.

9:05a **Timothy R. Bruce, Director of Traditional Research, Partner, NEPC**
Probability and Missed Opportunities: Why the Active vs. Passive Debate Will Never Die

9:25a **Panel Session:** *The Good, the Bad and the Ugly: Perspectives on Passive and Active Investing*

9:30a **Christopher Philips, Head of Vanguard Institutional Advisory Services**
Passive Investing

9:50a **Q&A**

10:10a **Gregory M. Dowling, CIO/Head of Research, Fund Evaluation Group**
Passive Aggressive

10:30a **Q&A**

10:50a **Break**

11:10a **Katie Nixon, CIO, Northern Trust**
Active or Passive

11:30a **Q&A**
All Speakers

STEERING COMMITTEE

Carrie Boer	Peter C. & Emajean Cook Foundation
Lori Bush	The Community Foundation of the Holland Zeeland Area
Steve Butler	One Quest Capital
Brian W. Dykstra	Oxford Financial Group, Ltd.
Patrick Gaughan	Brooks Capital Management
Ana Gonzalez	Family Owned Business Institute, Seidman-GVSU
John Kerschen	Charter Capital Partners
David Lindberg	Council of Michigan Foundations
Richard Noreen	BDO
Joerg Picard	Finance Department, GVSU
Jennifer Remondino	Warner Norcross & Judd LLP
Scott Spoelhof	Bayside Capital
Dan Van Timmeren	Kent Community Health Foundation
Kathleen Vogelslang	Van Andel Institute
Jim Wiersma	FIRM, LLC
Steve Zlotnicki	Spectrum Health

SPEAKERS

Timothy R. Bruce - Director of Traditional Research, Partner, NEPC

Tim joined NEPC in 2008. As director of traditional research at NEPC, Tim oversees a broad area of investment research spanning equities, fixed income, and real assets. Tim also is active NEPC's investment research and due diligence activities in alternative investments with a particular focus on hedged equity strategies. Outside of his formal research responsibilities, Tim provides consulting services for both traditional and non-traditional asset classes of various public, corporate, Taft-Hartley and endowment/foundation clients. Tim is a member of NEPC's International Equity Advisory Group and the Traditional Research Group.

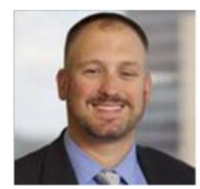
SPEAKERS

Katie Nixon - CIO, Northern Trust

Katie is an Executive Vice President and Chief Investment Officer for the Wealth Management business at Northern Trust. In that capacity, Katie leads the national investment management practice for Northern Trust's Wealth Management business from the firm's Chicago headquarters. Her responsibilities include investment policy development with a particular focus on portfolio construction and implementation. She also directs the investment management activities of over 200 Northern Trust portfolio managers across the firm's 60+ Wealth Management offices. Katie sits on the Firm's Investment Policy Committee and Tactical Asset Allocation Committee, and she chairs the Wealth Management Investment Advisory Committee.

Christopher Philips - CFA, Vanguard Institutional Advisory Services

Christopher leads the teams of investment professionals who provide asset allocation modeling, investment policy, consulting, portfolio construction recommendations, and ongoing investment management to endowment, foundation, and defined benefit clients. Prior to this role, he led a team of relationship managers for Vanguard's institutional investment-only clients focusing on defined benefit, defined contribution, nonprofit, and corporate assets. He joined Vanguard in 2000.



Gregory M. Dowling - CIO/Head of Research Fund Evaluation Group

Gregory is an investment professional since 1997 and a FEG team member since 2004. He has an MBA in Business Administration from Xavier University and a BSBA in Business Administration from the University of Cincinnati, he was nominated for the 2014 "Hedge Fund Consultant of the Year Award" by Institutional Investor and was named one of the 2015 "World's Most Influential (Specialist) Consultants" by Chief Investment Officer, he as an adjunct professor at the University of Cincinnati and Vice President of the Bowling Portfolio Management.