Academy for Institutional Investors

THE SPRING INVESTMENT ACADEMY FORUM

A Gathering Place for the Best & Brightest Investment Minds!

Educational Forums that Inspire a Culture of Collaboration, Community and Friendship Among Endowments, Foundations, Pensions, Hospitals, Insurance Firms, Family Offices, Consultants, OCIOs and Asset Managers.

MAY 18–19, 2027

THE CONRAD NASHVILLE
NASHVILLE, TN

https://www.academyforinstitutionalinvestors.org/

Academy for Institutional Investors

BY INVITATION ONLY

PRE-CONFERENCE

THE CIO ALLOCATOR CIRCLE

TUESDAY, MAY 18, 2027
8:30 am - 10:30 am
2-HOUR PRE-CONFERENCE EXPERIENCE

THE CONRAD NASHVILLE
NASHVILLE, TN

A CIO-TO-CIO WORKING CONVERSATION

Before the Spring Investment Academy Forum officially begins, the Academy will convene a carefully selected group of **Chief Investment Officers** for an intimate, highly interactive 2-hour **CIO Allocator Circle**. The goal is simple: create a trusted room where investment leaders can compare notes, challenge assumptions, and talk candidly about the decisions they are making across the full portfolio. The most valuable conversations among CIOs often happen when the room is small enough for people to speak openly and the agenda is flexible enough to follow what matters most. This CIO Allocator Huddle is designed to create that environment before the larger Forum begins—giving participating CIOs time to learn from one another, build relationships, and surface ideas that can carry into the broader Forum conversations that follow.

WHAT MAKES THIS A HUDDLE

- A working conversation—not a conference session
- A small, carefully curated group of CIO allocators
- No PowerPoint and no scripted panels
- Active participation from everyone around the table
- Discussion shaped by the priorities and experiences in the room

FULL-PORTFOLIO CONVERSATION

- Asset allocation and portfolio construction
- Liquidity and pacing across private markets
- Public markets, risk and changing market regimes
- Governance, and decision-making
- Manager selection and portfolio implementation
- Investment-office priorities, talent, technology, and AI

WHO SHOULD JOIN

The CIO Allocator Circle is designed for Chief Investment Officers from Endowments, Foundations, Pensions, Healthcare Systems, Insurance Firms and Single-Family Offices (SFOs).

To Register: **WWW.ACADEMYFORINSTITUTIONALINVESTORS.ORG**

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SPRING INVESTMENT ACADEMY FORUM
MAY 18-19, 2027 | THE CONRAD NASHVILLE | NASHVILLE, TN

CONFERENCE AT A GLANCE

MONDAY, MAY 17, 2027 – OPTIONAL PRE CONFERENCE NETWORKING

7:30 – 9:30 pm	Meet & Greet Dessert & Cocktail Reception at Thistle & Rye – Third Floor of Conrad Nashville

TUESDAY, MAY 18, 2027

Main Conference Day One & Day Two Sessions take place at the Conrad Hotel in the Ballroom

8:30 – 10:30 am	Pre-Conference: The CIO Allocator Circle – A CIO-TO-CIO WORKING CONVERSATION
10:15 – 11:00 am	Main Forum Registration & Networking for all Participants
11:00 – 11:15 am	Welcome & Introduction to Forum Co-Chairs
11:15 –12:15 pm	Keynote Opening Address: **Pippa Malmgren**, Economist/Best Selling Author/Former Presidential Advisor/Keynote Speaker/ The Geopolitical Institute
12:15 – 1:00 pm	Keynote CIO Discussion on Stage (Content Developed at the morning CIO Allocator Circle)
1:00 – 1:30 pm	Session Topic TBD
1:30 – 2:45 pm	Networking Luncheon
2:45 – 3:30 pm	Session Topic TBD
3:30 – 4:15 pm	Session Topic TBD
4:15 – 5:00 pm	Keynote Address: Oil Markets, Policy & Geopolitical Volatility Keynote Speaker: **Bob McNally, Founder & President, Rapidan**
5:00 pm	End of Day One Sessions
5:30 – 5:45 pm	Transportation Departs Hotel to our Dinner Party at The Twelve Thirty Club
6:00 – 9:00 pm	Welcome Reception & Networking Dinner Party at The Twelve Thirty Club Rooftop (550 Broadway)

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CONFERENCE AT A GLANCE

WEDNESAY, MAY 19, 2027

7:45 – 9:00 am	**"Allocator Only" Breakfast Topic Discussions**
7:45 – 9:00 am	**"Young Allocators Only"- Next Gen LP Leaders Club Breakfast Discussion**
8:15 – 9:00 am	**Continental Breakfast Available for all other Participants**
9:15 – 10:15 am	**Keynote Opening Address Day Two: Dan Clifton, Partner & Head of Policy Research, Baird Strategas**
10:15 – 11:00 am	**Session Topic TBD**
11:00 – 11:30 am	**Session Topic TBD**
11:30 – 12:00 pm	**Networking Break**
12:00 – 12:45 pm	**Session Topic TBD**
12:45 – 1:30 pm	**Session Topic TBD**
1:30 – 2:15 pm	**Pick up Lunch from Buffet – Return to Ballroom**
2:15 – 3:00 pm	**Keynote Closing Address**
3:00 – 3:30 pm	**Fireside Chat with Keynote**
3:30 pm	**End of the Spring Investment Academy Forum**

CPE Credits Available

Academy for Institutional Investors (AII) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority of the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

ABOUT ACADEMY FOR INSTITUTIONAL INVESTORS (AII)

Academy for Institutional Investors (AII) is a boutique, woman-owned educational platform dedicated to elevating dialogue and building meaningful connections across the institutional investment community. We create thoughtfully curated, non-commercial programs for senior investment decision-makers who value substantive content, candid conversation, and genuine peer-to-peer engagement.

The Academy hosts two flagship experiences each year—our **Spring and Fall Investment Forums**—along with our signature **Allocator Investment Huddles**, intimate, highly interactive gatherings designed around the perspectives and priorities of asset owners. Our community includes leaders from endowments, foundations, pension funds, healthcare systems, insurance companies, single- and multi-family offices, OCIOs, consultants, asset management firms, and other leading financial institutions.

THE AII DIFFERENCE

- **High Allocator-to-Manager Ratios** at every event
- **Cutting-Edge Educational Content** designed for senior institutional investors
- **Carefully Vetted Allocators** to ensure the integrity of our community
- **LP Referral Process** required for managers seeking to join AII
- **Personally Curated Attendance** to foster meaningful connections
- **Strict No-Marketing Policy** — no selling, soliciting, or fund promotion
- **No Required One-on-One Meetings** between allocators and managers
- **Off-the-Record Conversations** — no press or media permitted
- **Exceptional Southeast Venues** offering an intimate, high-end experience
- **Unique Networking Experiences** through shared activities, receptions, and dinners
- **27 Years of Investment Industry Conference Experience** working with LPs & GPs
- **Education First, Relationships Always** — fostering a collegial community built on trust and lasting friendships

For More Information on Becoming Part of the AII Community

WWW.ACADEMYFORINSTITUTIONALINVESTORS.ORG

Academy for Institutional Investors

THANK YOU TO OUR WONDERFUL

EDITORIAL COMMITTEE!

THE EDITORIAL COMMITTEE

The Editorial Committee helps set the direction and develop the cutting-edge timely topics and themes for all programming. The Committee assists AII in the recruitment of speakers, drives the development of the content, and acts as an informal advisory board and strategic resource. Our goal as a committee is to keep the investment community abreast of industry practices on a "real-time" basis and to sharpen the understanding of critical factors impacting long-term investment ideas leading to better returns.

Ali Bayler, Managing Director **New Republic Partners**	**Nolan Bean**, CIO / Head of Portfolio Management **FEG Investment Advisors**
J.P. Boyd, Vice President of Investments **Golden LEAF Foundation**	**Mary Cahill**, CEO & Chief Investment Officer **Acansa Investment Management Group**
Nicholas Csicsko, Managing Director **Trinity Church NYC**	**Celia Dallas**, Chief Investment Strategist **Cambridge Associates**
Jim Dunn, Chief Executive Officer **Verger Capital Management**	**Robert Durden**, CEO/CIO **UVIMCO**
Claire Fefer, Managing Partner **Arborwood Partners**	**Vanita W. Gaonkar**, Managing Director **DFO Management, LLC (Dell Family Office)**
Susanne Gealy, Founder **Alignment Alpha Research Consultants**	**David Gilmore**, Chief Investment Officer **The Harry and Jeanette Weinberg Foundation**
Larissa Herczeg, Managing Partner **1 Seed Partners**	**Brian Hiestand**, Chief Investment Officer **William & Mary**
Ray Jacobson, Chief Investment Officer **Davidson College**	**Dana Johns**, Partner **Courage Small Business Partners**
Beth Johnson, Former Partner; Not-for-Profit Investment Practice, **Formerly, Mercer**	**Kris Kapoor**, Chief Investment Officer **Bakala Capital**
Christine Kelleher, Managing Director **Strategic Investment Group**	**Larry Kochard**, Board Member & Retired CIO **Makena Capital Management**
Nina Lesavoy, Founder **Avec Capital**	**Rip Mecherle**, Chief Investment Officer **The University of Tennessee System**
Katherine Molnar, CFA, Chief Investment Officer **Fairfax County Police Officers Retirement System**	**Muthu Muthiah**, Chief Investment Officer **Children's Healthcare of Atlanta (CHOA)**
Brian Neale, Chief Investment Officer **University of Nebraska Foundation**	**Kate Nevin**, President & Portfolio Manager **TSWII Capital Advisors**
Lisa Pattis, Chief Executive Officer & CIO **Next Chapter Holdings**	**Mark E. Roberts**, Chief Investment Officer **Ironsides Asset Advisors**
Liza Scott, Managing Director **CornerStone Partners**	**Anne Shelton**, Chief Investment Officer **American Trading & Production Corp. (Atapco)**
Adela Skenderasi, Chief Investment Officer **Cystic Fibrosis Foundation**	**Donna L. Snider**, SVP, Chief Investment Officer **Hackensack Meridian Health**
Mark Steed, Chief Investment Officer **Arizona PSPRS Trust**	**Kyle Stewart**, Senior Investment Director **Children's Health**
Andrea Szigethy, Founder & CEO **Academy for Institutional Investors**	**Michael Wallace**, Director, Investments **Curi**
Dan Ward, Chief Investment Officer **GreenHawk Corporation**	**Karen Horn Welch**, Chief Investment Officer **Spider Management Company (University of Richmond)**
Mel Williams, General Partner **TrueBridge Capital**	**Emily Wood**, Chief Investment Officer **Gilder Office for Growth**

Academy for Institutional Investors

AII UPCOMING FORUMS & HUDDLES

Upcoming Member Forums

Approximately 325 Participants with at least a 50/50 Allocator to Manager Ratio

Spring Investment Academy Forum

May 18-19, 2027

Conrad Nashville, Nashville, TN

Fall Investment Academy Forum

October 25-26, 2027

Washington Duke Inn, Durham, NC

Invitation-Only Allocator Investment Huddles

Approximately 40 Participants with at least 70% Allocator Representation

Allocator Investment Huddle	**December 7-8, 2026** *(The Full Portfolio)*	**The Umstead Hotel & Spa** Cary, NC
Allocator Investment Huddle	**March 1-2, 2027** *(The Full Portfolio)*	**The Jefferson Hotel** Richmond, VA
Allocator Investment Huddle	**August 23-24, 2027** *(Private Markets Focus)*	**The Umstead Hotel & Spa** Cary, NC
Allocator Investment Huddle	**December 6-7, 2027** *(The Full Portfolio)*	**Hôtel Swexan** Dallas, TX

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REGISTER TODAY TO

SECURE YOUR SEAT!

SPRING INVESTMENT ACADEMY FORUM

REGISTER HERE

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CONRAD NASHVILLE

Nashville, Tennessee

LIMITED ACCESS | AT LEAST 50/50 LP–GP RATIO