

# **HIRTLE CALLAGHAN**

## **INVESTORS' CONFERENCE**

### **PROMISE-DRIVEN INVESTING**



**OCTOBER 5<sup>TH</sup> – 8<sup>TH</sup>, 2021**

THE BROADMOOR, COLORADO SPRINGS, CO

**HIRTLE  
CALLAGHAN  
& CO**

Chief  
Investment  
Officers

# CONFERENCE AGENDA

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## Tuesday October 5<sup>th</sup>, 2021

The Broadmoor

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5:00 PM – 7:00 PM

### Welcome Cocktails

We look forward to welcoming you over cocktails and light bites while offering an introduction to falconry. Experience an up-close encounter with The Broadmoor's majestic birds and observe a flight demonstration – a great opportunity for a photo-op!

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## Wednesday October 6<sup>th</sup>, 2021

The Broadmoor

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7:30 AM - 10:30 AM

### Choice of Activities to Start Your Day

**Scenic Walk:** (2-3 miles) Explore the stunning Garden of the Gods Park on this iconic, yet easy, guided hike. You will get to enjoy panoramic views and see red rock formations while learning fun facts about amazing topography and the Native Americans who consider this land sacred. These relatively easy trails are perfect for any ability level.

**Intermediate Hike:** (5 miles) A step up from the Scenic Walk, this intermediate guided hike explores the less-traveled side trails of the Garden of the Gods Park, allowing hikers to enjoy some of the hidden park features not typically seen by visitors.

**Downhill Mountain Bike:** Enjoy panoramic views on this guided, downhill mountain bike ride that follows a historic railway trail through the Cheyenne Canyon wilderness. This gently downward sloping gravel path is suitable for most riders and can be enjoyed at your own pace while stopping to take in the views and snap photos. While not overly physically exerting, riders should be comfortable riding a bike on varying terrain such as gravel and mild bumps to fully enjoy this excursion.

**Tour of the U.S. Air Force Academy:** This behind-the-scenes tour will take give you a glimpse into the life of a cadet at one of our nation's military service academies located in Colorado Springs. You will have an opportunity to hear from select members of the Academy's senior leadership team as they welcome us on our visit. Comfy shoes are a must for this tour, as there will be plenty of walking!

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11:00 AM – 12:00 PM

### Live Quarterly Webcast with Members of the Investment Team

Join us for a live webcast to kick off our conference. CIO Mark Hamilton and members of the investment team will offer their latest views on the markets and discuss portfolio positioning in the current environment.

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12:00 PM – 1:00 PM

### Lunch with HC Team and Peers

Gather with HC professionals and peers for lunch on the covered terrace overlooking Cheyenne Canyon.

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**1:30 PM – 3:00 PM**

*Please choose one of the following*

**Family Breakout Session:**

**Family Values: Clarify What Matters Most**

Decision-making is easier and more harmonious when families are guided by their shared values. Join us for an interactive exercise designed to help you determine the values that matter the most to you. Along with an outside expert, we will facilitate a session that helps you think through how your values should inform decisions on philanthropy and investing.

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**Institutional Breakout Session:**

**Mission-Driven Investing for Institutions: Advances in ESG and Impact**

Join Susan Hammel, CEO of Cogent Consulting, to gain a fresh perspective on the different paths that institutions can take to align their investments with their mission. This session aims to be interactive, offering case studies and opportunities to meet your peers.

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**3:00 PM – 4:30 PM**

*Please choose one of the following*

**Family Breakout Session:**

**Mission-Driven Investing for Families: Advances in ESG and Impact**

Join Susan Hammel, CEO of Cogent Consulting, to learn about the evolving ways families can align their investments with their philanthropic goals. This session will be interactive and offer an opportunity to collaborate with your peers.

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**Institutional Breakout Session:**

**The Adaptive Nonprofit Board: Investment Governance for a New Era**

How can your board best support your organization in an ever more challenging environment for nonprofits? Join governance experts Stephanie Rogen and Georgy Ann Peluchowski of Greenwich Leadership Partners for an interactive session on best practices in nonprofit board governance today.

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**6:00 PM**

**Cocktails, Dinner and Entertainment**

Join us for a traditional Western experience at The Broadmoor's Cheyenne Lodge with beautiful sunset views where we can mix and mingle over cocktails. We will move inside for a sit-down dinner and then cap the night off with a dessert of s'mores around outdoor firepits.

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## Thursday October 7<sup>th</sup>, 2021

The Broadmoor

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7:30 AM – 8:30 AM Breakfast

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8:30 AM – 9:00 AM **Welcome from Executive Chairman Jon Hirtle**

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9:00 AM – 10:00 AM **Keynote with Peter Sheahan**

Peter Sheahan is a highly successful entrepreneur and author renowned for his innovative business thinking and thought leadership. Peter focuses on how companies can disrupt crowded markets by developing new business models that take their clients on a journey to the future.

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10:00 AM – 10:30 AM **Harnessing Complexity with CIO Mark Hamilton**

Mark Hamilton will highlight recent innovations within our investment office. He will discuss how we access the full spectrum of investment opportunities to capture high, risk-adjusted, net returns.

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10:30 AM – 10:45 AM Break

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10:45 AM – 11:30 AM **Approach to Public Equity: Jennison Associates**

Paul Shaffer, Associate Director, and Rebecca Irwin from Jennison Associates will explore the investment themes within the equity markets as the recovery takes hold. They will talk about the opportunities and risks of investing in secular growth businesses.

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11:30 AM – 12:15 AM **Focus on Active Management: BlueSpruce Investments**

In this session, Matt Mead, Director of Public Equity, will talk with Tim Hurd from BlueSpruce about his innovative private equity approach to public market investing. They will discuss BlueSpruce's focus on high quality public companies and the opportunities that they are seeing in today's economy.

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12:15 PM – 1:15 PM Lunch with HC Team and Peers

Gather with HC professionals and peers for lunch on the covered terrace overlooking Cheyenne Canyon.

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1:15 PM – 2:15 PM **Macro Context: Clocktower Group**

Dan McCollum, Deputy CIO, will talk to Marko Papic, Chief Strategist at Clocktower Group, about his views on the current geopolitical and macroeconomic environment and its impact on the financial markets. The conversation will focus on the paradigm shifts that will drive investment returns over the next decade.

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2:15 PM – 3:00 PM **Innovations in Private Equity: ARCH Venture Capital**

Stephen Vaccaro, Director of Private Equity, will speak with ARCH Venture Capital about how they are using disruptive science to create revolutionary medicines and biotech companies that can impact people's lives and generate outsized returns for investors.

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3:00 PM – 3:15 PM Break

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3:15 PM – 4:15 PM **Opportunities in Private Credit: Medalist Partners**

Brad Conger, Deputy CIO, and Greg Richter, the Managing Partner of Medalist Partners, will discuss the evolving landscape within the private credit markets. They will focus on the growing opportunity of lending against hard assets in the private markets.

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4:15 PM – 4:30 PM **Investment Leadership Award: Ted Seides, Host of Capital Allocators**

Ted hosts the popular investment podcast Capital Allocators, where he interviews the world's elite money managers to distill best practices and lessons learned.

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Evening

Dinner and Bowling at Play

Play offers a whimsical take on bowling and dining with retro American fare, festive cocktails and games to keep the fun going.

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**Friday October 8<sup>th</sup>, 2021**

The Broadmoor

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Morning

Departures

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INVESTMENT SOLUTIONS FOR A COMPLEX WORLD



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