

Agenda

Day One		
11:30 a.m. - 7:00 p.m.	Registration	<i>Grand Nave Foyer</i>
12:30 - 2:30 p.m.	<p>CFA Institute Workshop Series: Diversity and Inclusion in the Investment Management Profession</p> <p>During this workshop, attendees will have the opportunity to work with other participants to create a diversity and inclusion implementation plan, returning to their employer equipped with new and practical options to strengthen their efforts. This workshop will be especially useful to those that attend with a colleague. An identical session covering the same material will be offered at 3:00 p.m.</p> <ul style="list-style-type: none"> • Rebecca Fender, CFA, head, Future of Finance, CFA Institute • Dr. Kelli Palmer, Ph.D., head, Global Diversity and Inclusion and Corporate Citizenship, CFA Institute 	<i>Tofanelli</i>
2:30 - 3:00 p.m.	Networking Break	
3:00 - 5:00 p.m.	<p>CFA Institute Workshop Series: Diversity and Inclusion in the Investment Management Profession</p> <p><i>Session identical to the 12:30 - 2:30 p.m. session.</i></p> <p>Speaker: Deep Dive into Human Capital Management Metrics</p> <p>Dr. Hesketh will present new research on Human Capital Management metrics and how they relate to firm performance.</p> <ul style="list-style-type: none"> • Dr. Anthony Hesketh, associate professor, Lancaster University Management School, UK 	<i>Tofanelli</i>
5:00 - 7:00 p.m.	<p>Networking Reception</p> <p>Open to all participants from Day 1 and Day 2. Light appetizers, refreshments, and no-host bar available.</p> <ul style="list-style-type: none"> • Welcome Remarks: Marcie Frost, CEO, CalPERS 	<i>Morgan Restaurant</i>
Day Two		
7:30 - 8:30 a.m.	Registration and Networking Breakfast	<i>Grand Nave Foyer</i>
8:30 - 8:40 a.m.	<p>Welcome Remarks</p> <ul style="list-style-type: none"> • Henry Jones, president, CalPERS Board • Sharon Hendricks, chair, CalSTRS Board 	<i>Magnolia & Camellia Ballrooms</i>
8:40 - 9:00 a.m.	<p>Opening Keynote: Setting the Stage - Why Diversity Matters</p> <ul style="list-style-type: none"> • Sallie Krawcheck, CEO & co-founder, Ellevest 	<i>Magnolia & Camellia Ballrooms</i>

Day Two, continued

9:00 – 9:45 a.m.	The Why and How of Driving Diversity and Inclusion Experts from McKinsey & Company and Stanford’s VMware Women’s Leadership Innovation Lab present the latest research on diversity and what happens when there is “Only One”, as well effective steps to increasing diversity and inclusion. Mini-Keynotes followed by a Fireside chat. <ul style="list-style-type: none">• Celia Huber, senior partner, McKinsey & Company• Lori Nishiura Mackenzie, co-founder, Stanford VMware Women’s Leadership Innovation Lab	<i>Magnolia & Camellia Ballrooms</i>
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9:45 – 10:15 a.m. **Networking Break**

10:15 – 11:15 a.m.	New Research: Human Capital Management Metrics and Performance Join us for the latest research on human capital metrics and how they help investors better understand how you manage, measure, and report long-term value creation. Mini-Keynotes followed by moderator led discussion. <ul style="list-style-type: none">• Moderator: Cambria Allen-Ratzlaff, corporate governance director, UAW Retiree Medical Benefits Trust• Erik Bradbury, CPA, partner, EY• Dr. Anthony Hesketh, associate professor, Lancaster University Management School, UK	<i>Magnolia & Camellia Ballrooms</i>
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11:15 a.m. – 12:15 p.m.	Best Practices: Building and Retaining a Diverse and Inclusive Workforce Research demonstrates inclusive workplaces generate greater employee engagement and productivity, lower turnover rates, and better long-term performance. Leaders from the investment industry present the successful strategies they undertook to increase diversity and inclusion and how they are engaging with companies to increase diversity in the companies they own. This will be a moderated panel discussion. <ul style="list-style-type: none">• Moderator: Kara Helander, chief inclusion and diversity officer, The Carlyle Group• Erika Irish Brown, chief diversity officer, Goldman Sachs• Sekou Kaalund, managing director and head of advancing black pathways, JPMorgan Chase• Rakhi Kumar, senior managing director, head of ESG investments and asset stewardship, State Street Global Advisors	<i>Magnolia & Camellia Ballrooms</i>
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12:15 – 1:15 p.m.	Lunch - A buffet luncheon will be provided for all participants.	<i>Grand Nave Foyer</i>
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Agenda

Day Two, *continued*

1:15 – 1:45 p.m.	<p>Afternoon Keynote: Successfully Increasing Diversity</p> <p>A primary force behind the recent increase in Black-produced, directed, and acted films and television, Brickson Diamond will speak on his successful efforts to increase diversity in the investment industry, corporate America, and entertainment and how you can do the same in your organization.</p> <ul style="list-style-type: none"> • Introduction: Lisa Middleton, board member, CalPERS Board • Brickson Diamond, CEO, Big Answers, LLC 	<i>Magnolia & Camellia Ballrooms</i>
1:45 – 2:45 p.m.	<p>The Importance of Culture: Evidence and Practice</p> <p>Building and sustaining a positive corporate culture has become increasingly important to an organization’s market value. This panel will discuss why culture matters and how to create and sustain the right kind of culture. Mini-Keynotes followed by moderator led discussion.</p> <ul style="list-style-type: none"> • Moderator: Olivia (Mandy) O’Neill, Ph.D., associate professor of management and center for the advancement of well-being senior scientist, George Mason University • Paige Ross, Ph.D., senior managing director & global head of human resources, Blackstone • Horacio A. Valeiras, CFA, CEO, partner, Frontier Global Partners, LLC 	<i>Magnolia & Camellia Ballrooms</i>
2:45 – 3:15 p.m. Networking Break and Transition - <i>Dessert will be served in the Grand Nave Foyer</i>		
3:15 – 4:00 p.m.	<p>CIO to CIO</p> <p>Experience and fresh insight come together as leaders from the two largest pension plans in the U.S. engage in a fireside chat led by CIO, Mary Pugh, on diversity, investments, and the state of the world.</p> <ul style="list-style-type: none"> • Moderator: Mary Pugh, CEO & CIO, Pugh Capital Management • Chris Ailman, CIO, CalSTRS • Yu (Ben) Meng, Ph.D., CIO, CalPERS 	<i>Magnolia & Camellia Ballrooms</i>
4:00 – 4:30 p.m.	<p>Closing Keynote: Call to Action</p> <ul style="list-style-type: none"> • Introduction: Rob Feckner, Investment Committee chair, CalPERS Board • Sheila C. Johnson, founder and CEO, Salamander Hotels & Resorts 	<i>Magnolia & Camellia Ballrooms</i>
4:30 – 4:45 p.m.	<p>Closing Remarks</p> <ul style="list-style-type: none"> • Dana Dillon, board member, CalSTRS Board 	<i>Magnolia & Camellia Ballrooms</i>