


Aoifinn Devitt, Director, CLONTARF CAPITAL


Prior to establishing Clontarf Capital in 2006, Aoifinn was a specialist consultant at Cambridge Associates Limited (London and Boston), where she specialized in the alternatives area, with a particular focus on hedge funds. Clontarf Capital is an advisory firm specializing solely in alternative assets, including hedge funds, private equity commodities and real estate (www.clontarfcapital.com). While at Cambridge Associates she led the European hedge fund research effort, and also assisted a range of family office and institutional clients with their alternative asset allocations. This work included providing overall advice relating to individual strategies and managers, assisting with fund of fund and direct manager selection and acting as lead advisor for six separate accounts with assets totaling \$550 million.

Prior to joining Cambridge Associates in 2002, Aoifinn worked in the investment banking division of Goldman Sachs International in London. From 1995 - 1999 she worked as a corporate attorney at Debevoise & Plimpton in their New York and Hong Kong offices, where she specialized in providing advice to private equity sponsors and funds of funds, along with more general corporate assignments.

Aoifinn has a first class degree in law from Trinity College Dublin, a BCL (Oxon) and an MBA (Dean's list) from INSEAD. She is a member of the New York Bar.

Adi Divgi, President, EA GLOBAL LLC (SFO)


Adi Divgi currently manages investments on behalf of his single family office, EA Global, and provides advisory services on alternatives to clients. Prior to EA Global, Mr. Divgi worked as a director at Auriga, managing a portfolio of US RMBS and Latin American corporate credits. Prior to Auriga, Mr. Divgi co-managed the secondary credit and structured finance portfolios at Patriarch Partners, with close to \$5 billion in assets under management. Mr. Divgi began his credit career at Deutsche Bank, working in the New York and Mexico City offices, first in secondary trading followed by principal finance and Latin American securitization. A graduate of the Huntsman Program, Mr. Divgi has a BA in International Studies and Spanish from the University of Pennsylvania, and a BS in Economics and MBA in Finance from the Wharton School.

Andrew Dougherty, Managing Director and Head of Alternative & Institutional Solutions, BNP PARIBAS


Andrew Dougherty is Managing Director and Head of Alternative & Institutional Solutions for BNP Paribas. Andrew has been with BNP Paribas for more than 10 years. In his current role, Andrew is responsible for managing the group's US hedge fund administration platform and related business lines, including custody and financing for fund of hedge funds, middle office outsourcing, and enhanced performance and risk reporting solutions for asset managers. Andrew has dual location responsibilities in New York, NY and King of Prussia, PA, the operations hub for the Americas.

Prior to this role, Andrew served as Chief Operating Officer for BNP Paribas Financial Services, where he was responsible for all operational and information technology aspects of the aforementioned business lines. Before this, Andrew worked at CooperNeff Advisors where he began as the manager of the middle office for the high volume proprietary trading desks of CooperNeff. He then served as Vice President, Market Control & Development with responsibility for the risk control, middle office, and IT development groups of CooperNeff on both the proprietary trading and hedge fund areas of the business. Prior to his experience with BNP Paribas and CooperNeff, Andrew held various accounting and finance positions with DVI Financial Services, a specialty healthcare financing and leasing company.

Andrew holds a BS in Financial Services from Delaware Valley College and an MBA in Finance and Management from the Wharton School of Business, University of Pennsylvania.

Dawn Dzurilla, Founder & Managing Partner, GAIA HUMAN CAPITAL PARTNERS


Dawn Dzurilla is Founder & Managing Partner of Gaia Human Capital Partners, founded in 2006, provides executive search consulting services to clients in the global all-cleantech, renewable energy and sustainability industry including: solar energy, wind energy, tidal power, waste to energy, biofuel, engineering firms, private equity/venture capital, energy efficiency, university, natural food cooperatives, non-profit organizations, environmental technology consulting, advanced automotive technology and industry developers. Immediately prior to founding Gaia HC, Dawn was involved in the investment management industry. As Co-founder and President of H3 Capital LLC, an innovative Socially Responsible and Mission-driven Investment Management (SRM) firm that considers environmental, social and corporate governance criteria to generate long-term competitive financial returns and positive societal impact, Dawn's mandate built a team of investment professionals, promoted sustainability investment practices to asset consultants, fund managers, financial advisers, dealer groups and participants throughout the investment chain.

Dawn has spoken about Green Employee Benefits at various Opal Financial Conferences. Prior to H3, Dawn founded Benchmark Human Capital, a retained executive search firm specialized in the global financial services industry, extensively representing clients within the investment management and mutual fund industries. She completed scores of C-level and professional search assignments. Prior, she led the financial services practice at Haskell & Stern Associates and was a Principal (Senior Search Consultant) at Warren International. Dawn served as Managing Director of Corporate Development for a U.S. manufacturer of environmental and medical waste management technology solutions. Dawn began her career at Smith Barney, structuring principal and strategic transactions and in Smith Barney's Commodities Futures Group, evaluating the investment/credit risk for Corporate and High Net Worth clients.

Dawn is past National Chair of Human Capital at The Cleantech Open, member of the Board of Directors of the Collier County Society of Human Resources Management (SHRM), Leadership Council of the American Council on Renewable Energy (ACORE) and served as Chair of a regional Florida Alliance for Renewable Energy (FARE) tour and town hall. She is a resident of New York City and San Francisco, earned her Bachelor of Science Degree in Business Administration from St. John's University in New York, NY.

agenda



5:00 pm	<p>THE JOBS ACT: HOW WILL THIS AFFECT THE ALTERNATIVES INDUSTRY?</p> <ul style="list-style-type: none"> • New ways to reach investors • How can managers enhance their brands through usage of traditional and new media? • How will this affect the way investors work with managers? 	<p>Moderator: Cara Fleckenstein, Managing Director, AGECROFT PARTNERS</p> <p>Panelists: Richard Weintraub, Chief Compliance Officer, COMMUNITYLEADER, INC. Travis Majors, Institutional Sales, PENSCO TRUST COMPANY Lawrence N. Taylor, Founder & CEO, CHRISTINA DEVELOPMENT CORPORATION</p>
5:45 pm	<p>RISK</p> <ul style="list-style-type: none"> • Are hedge funds a sound alternative for asset allocation in the short term? • Managing portfolio tail risk • Are there some overlaps between operational risk and investment risk? • What strategies are being used now? • Risks involved in hiring a hedge fund manager • How much risk are funds taking on in their quest for greater returns? • Performance and risk monitoring 	<p>Moderator: Sharath Sury, Executive Director, STRATEGIC INVESTORS (SIFIRM)</p> <p>Panelists: William Rentz, PhD, LIFA, Professor/APUD Member of the Pension Fund Investment Committee, UNIVERSITY OF OTTAWA Charlie Chittenden, Principal & Consulting Actuary, BUCK CONSULTANTS Eric Flanagan, Founding Principal, EMF FINANCIAL PRODUCTS LLC</p>
6:30 pm	Cocktail Reception	<p>Sponsored by: SOCIÉTÉ GÉNÉRALE</p>

CONFERENCE DAY 2 - Monday, December 9, 2013

7:20 am	Continental Breakfast	<p>Sponsored by: PENSCO</p>
7:20 am	INVESTOR CLOSED DOOR BREAKFAST	<p>Facilitator: Skip Coomber, President, COOMBER FAMILY ESTATES FAMILY OFFICE (SFO)</p>
8:20 am	Welcoming Remarks	<p>John Girard, Trustee, BOCA RATON (FL) POLICE & FIRE RETIREMENT ASSOCIATION</p>
8:30 am	USING YOUR RETIREMENT FUNDS TO INVEST IN ALTERNATIVE ASSETS	<p>Kelly Rodrigues, President and Chief Executive Officer, PENSCO TRUST COMPANY</p>
8:50 am	THE BEST VALUE INVESTING OPPORTUNITY TODAY	<p>Jeffrey Pinter, Principal, PINTAR INVESTMENT COMPANY, LLC</p>
9:10 am	GLOBAL TRENDS AND OUTLOOK: WHAT'S AHEAD FOR THE GLOBAL ECONOMY AND THE MAJOR CAPITAL MARKETS	<p>Frank Barber, Jr., CMT, Co-Portfolio Manager, SIERRA MUTUAL FUNDS</p>

	TRACK A	TRACK B
9:30 am	<p>INVESTING IN CREDIT & FIXED INCOME</p> <ul style="list-style-type: none"> • Major trends in the credit markets for 2014 • Exploiting inefficiencies in the credit markets • Benefits of investing in structured products • How to take advantage of global credit markets? • Discussion of the Maturity Wall • Profile of Loan Investors • Opportunities resulting from bank deleveraging in US and Europe <p>Moderator: Adi Divot, President, EA GLOBAL (SFO)</p> <p>Panelists: Andrew Peisch, Managing Director, Head of Business</p>	<p>ASSET ALLOCATION: THE ROLE OF ALTERNATIVE INVESTMENTS</p> <ul style="list-style-type: none"> • What percentage should be allocated to alternative investments? • Realistic expectations moving forward • How should you diversify across hedge funds, fund of hedge funds, private equity and other alternative asset classes? • Investor concerns for the upcoming year • Critical considerations for hedge fund allocation • Selecting the optimum asset allocation for your alternatives portfolio • The current and prospective global economic trends in asset allocation • What are the costs of implementing alternative allocation?