



RFK Compass Fall Investor Conference | Los Angeles
Tuesday, October 29 – Wednesday, October 30
Venue: Los Angeles County Museum of Art | 5905 Wilshire Boulevard, Los Angeles, CA

Conference Agenda

Tuesday, October 29

Welcome Cocktails and Dinner

6:30 PM **Cocktail Reception and Museum Tour**

7:15 PM **Welcome Dinner *(RSVP Needed)***

Guest Speakers:

José Feliciano, Co-Founder and Managing Partner, Clearlake Capital
and Board Member, Robert F. Kennedy Human Rights

Kerry Kennedy, President, Robert F. Kennedy Human Rights

Gloria Reuben, Actress, Singer, Author, Activist, and RFK Human
Rights Leadership Council Member

**Fireside Chat: The Role of Financiers in Social Justice – The
Opportunity to do Good While Making Profit**

A fireside conversation with **Scott Miner**, Managing Partner,
Chairman of Investments and Global Chief Investment Officer,
Guggenheim Investments

Interviewed by **Norman Pearlstine**, Executive Editor, Los Angeles
Times

9:30 PM **Dinner Concludes**



RFK Compass Fall Investor Conference | Los Angeles Wednesday, October 30

Venue: 1 Hotel West Hollywood | 8490 Sunset Boulevard, West Hollywood, CA

Conference Agenda

8:00 AM **Registration and Breakfast**

9:00 AM **Welcome Remarks**

Sancia Dalley, Senior Vice President, Strategic Partnerships & Director,
RFK Compass Investor Program, Robert F. Kennedy Human Rights

9:05 AM **KEYNOTE FIRESIDE CHAT: A Conversation with Fiona Ma, 34th Treasurer,
State of California**

As the **Treasurer of the State of California, Fiona Ma** is addressing income inequality for Californians and climate change, developing innovative financing solutions, and tackling diversity and inclusion within her organization; all while serving as the chief custodian and “head banker” of the monies of the 5th largest economy in the world.

Interviewed by **Kerry Kennedy**, President, Robert F. Kennedy Human Rights

9:35 AM

PANEL: Racial Bias and Talent Pipeline in the Investment Sector – Is this a Myth?

A recent study of 180 allocators led by Stanford University’s SPARQ and Illumen Capital sheds new light on the challenges minorities face in the investment sector when fundraising. Less than 2% of the global assets under management are managed by women and minority owned funds, and this gets dismally lower as the industry becomes more niche. This conversation will share findings from the study, dissect the oft-heard “pipeline challenge” and offer examples of where and how asset allocators can better support women and minorities in the investment sector.

Speakers:

Daryn Dodson, Founder and Managing Director, Illumen Capital

Michael Frerichs, Treasurer, State of Illinois

Sue Toigo, Co-Founder, Robert H. Toigo Foundation and Chairman, Fitzgibbon Toigo & Co.

Moderated by **Xavier Gutierrez**, Managing Director, Clearlake Capital

10:15 AM

PANEL: Managing Risks as Trustees – A Discussion on Board Diversity, Labor Practices, and the #MeToo Movement

Increasingly, Trustees are grappling with risks that are more than financial. With greater visibility being placed on ESG risks such as diversity, fair labor practices and discrimination, the role of Trustees to help steward a pension fund with equal focus on returns and societal impact is even more critical. This discussion will center on the following:

- *What actions can Trustees take to address this issue in the board rooms and teams of public pension funds?*
- *How are investors addressing these issues in their portfolio companies?*
- *What more can be done to change the power and pay dynamic within the investment and finance sector?*

Speakers:

Priya Mathur, Former President, California Public Employees Retirement System

Paul Muratore, Trustee and Investment Committee Member, SAG Pension Fund

Gina Sanchez, Board Member, Los Angeles County Employee Retirement Association

Moderated by **Anne Simpson**, Director, Board Governance and Strategy, California Public Employees' Retirement System

10:55 AM Morning Coffee Break

11:10 AM IN CONVERSATION: The Dissonance of Priorities – Portfolio Construction and Competing Needs

CIOs and their teams are expected to deliver superior risk-adjusted returns for their assets in the face of other priorities that range from low fees, ESG considerations, under-funding, data and privacy laws, and many more. How do they navigate these often-competing priorities in an increasingly turbulent market cycle?

Speaker:

Jonathan Grabel, Chief Investment Officer, Los Angeles County Employees Retirement Association

Interviewed by **José Feliciano**, Co-Founder and Managing Partner, Clearlake Capital and Board Member, Robert F. Kennedy Human Rights

11:40 AM SPOTLIGHT TALK: Algorithms of Oppression

Digital technology and its narratives are shaped by and infused with values that are not impartial, disembodied, or lacking positionality. Technologies consist of a set of social practices, situated within the dynamics of race, gender, class, and politics. In this talk, Dr. Safiya Noble, Associate Professor and Co-Director of the UCLA Center for Critical Internet Inquiry, examines power struggles over representation on the web, and the consequences of marginalization and misrepresentation in commercial internet platforms.

Speaker:

Safiya Noble, Ph.D., Author, Associate Professor and Co-Director of the Center for Critical Internet Inquiry, UCLA

12:05 PM Interactive Case Study Workshop on Business & Human Rights

Facilitated by **Michael Posner**, Director and Professor of Business and Society, Center for Business and Human Rights, NYU Stern School of Business

The workshop will look at Silver Lake, a U.S. private equity firm, which helped lead a \$620 million financing round for SenseTime in May 2018. SenseTime is a Chinese artificial intelligence company and a global leader in facial recognition software. Its technology has been used by Chinese government security services, and the company has ties to the sweeping surveillance program of the Uyghur minority population in Xinjiang.

1:00 PM **Lunch**

1:20 PM **LUNCHEON FIRESIDE CHAT: Climate Justice in the 21st Century—
Challenges and Opportunities for Investors and Businesses**

*Join us for an engaging fireside chat on the current state of climate change and justice with environment and energy author, lecturer, strategist, and **President of 7th Generation Advisors Terry Tamminen**. Terry will share the implications of inaction, opportunities for investors in the space, and what to anticipate in the coming year.*

Interviewed by **Wendy Abrams**, Founder of Cool Globes and 2019 RFK Human Rights Ripple of Hope Laureate

2:00 PM **IN CONVERSATION: A Discussion with Google on Rights, Regulation,
and Freedom of Expression**

The internet has become a platform to empower individuals to exercise freedom of speech, as is protected under the First Amendment, but on the other hand, the free flow of content has called for the need for regulation, as cases of hate speech and disinformation have risen.

Hear from a Google executive on how companies are protecting free speech, what the regulation of content entails in the age of social media and technological advancements, and what the future of freedom of expression online may look like.

Speaker:

Alexandria Walden, Counsel, Free Expression and Human Rights, Google

Interviewed by **Michael Posner**, Director and Professor of Business and Society, Center for Business and Human Rights, NYU Stern School of Business

2:35 PM

PANEL: The Future We Want – Driving Impact as Leaders in Male-Dominated Industries

Join us for a conversation with these exceptional women leaders who are blazing trails in their respective industries of health technology, entertainment, and social impact. This will be a conversation about inclusion and diversity in the technology, finance and entertainment industry and how these panelists are using their status and voices to tackle the systemic changes necessary to address the diversity gap.

Speakers:

Ivor Horn, Clinical Advisor, Accolade

Gloria Reuben, Actor, Singer, Author, Activist, and RFK Human Rights Leadership Council Member

Lindsay Scola, Director of Strategic Communications and Social Impact, Friends at Work

Harriet Steel, Global Head of Business Development, Hermes Investment Management

Moderated by **Kerry Kennedy**, President, Robert F. Kennedy Human Rights

3:10 PM

Afternoon Coffee Break

3:25 PM

IN CONVERSATION: Navigating the Climate Crisis – The Investment Perspective

Join us for an ongoing discussion on the climate crisis and how the investment sector is taking tangible actions to address climate-related challenges. This discussion will address some of the risks and opportunities, the potential implications of a transition to a low carbon economy, and constructing portfolios in the energy sector that consider profit and environmental impact.

Speaker:

Michael Levitt, Chief Executive Officer, Kayne Anderson Capital Advisors

Moderated by **David Fann**, Founder, President, and Chief Executive Officer, TorreyCove Capital Partners

4:00 PM **PANEL: Market Watch – Fees, Elections and Trade Wars**

Many variables that investors have to consider are often outside of their control, from national elections, geopolitical tensions, international trade disputes and the like. This panel of investors will share their perspectives on 2019's market performance thus far while offering helpful insights into what they are anticipating in 2020 given on-going issues such as fees, U.S.-China relations, and Brexit, to name a few.

Speakers:

Evril Clayton, Deputy Director, Global Equity, New York State Common Retirement Fund

Reginald Tucker, Managing Director, Investments, Orange County Employees Retirement System

Moderated by **Allen Ruiz**, Director, Barings

4:35 PM **CLOSING FIRESIDE CHAT: Creating Economic and Social Value Within Private Equity**

Private Equity is uniquely positioned to generate superior economic returns and social value through their investment vehicles. Vista Equity Partners sits at the intersection of key technology innovations and investment performance. Their work aims to generate superior financial returns while driving social impact through a unique approach of investing in software and data companies. With a proven record of both superior financial returns and domain expertise in impact sectors through prior investments (philanthropic, education, government, and health & wellness), hear from Kristin Nimsger (CEO of Social Solutions) and Jamie Ford (Principal, Vista Equity Partners and President, Vista Public Strategies) discuss the unique role that technology companies play in driving financial and impact value.

Speaker:

Kristin Nimsger, Chief Executive Officer, Social Solutions

Interviewed by **Jamie Ford**, Principal, Vista Equity Partners and President, Vista Public Strategies

5:00 PM **Closing Remarks (Followed by Networking Cocktails)**

Sancia Dalley, Senior Vice President, Strategic Partnerships & Director, RFK Compass Investor Program, Robert F. Kennedy Human Rights

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