



December 2014

PLEASE JOIN PENTEGRA AT THE OCIO OUTSOURCING CONFERENCE

We are pleased to announce that Pentegra's Scott Stone, Senior Vice President and Chief Investment Officer will be speaking at the upcoming **Investment Management Institute's OCIO Outsourcing Conference Thursday, December 4, 2014 - Friday, December 5, 2014, at the Hyatt Regency Hotel, Greenwich, CT.**

This one and a half-day intensive program will enable you to present and share information and ideas which will help to grow your business and navigate through these uncharted investment waters.

Conference Highlights:

- Challenges Facing Institutions
- How is the Consultants Model Evolving?
- Fiduciary Protocol – Sources of Concern
- Keeping Up with New Products and Strategies
- Different Outsourcing Models
- Sourcing the Provider Who To Choose – Consultants or Money Manager
- Indemnification – Making it Right
- Avoiding Conflicts with the OCIO Provider
- Changing Role of the Investment Committee
- The Benefits of OCIO from a Client's Perspective
- Customizing the OCIO Services
- Retaining the Consultant in an Advisory Role
- Obtaining Performance Over Multiple Asset Classes—Featuring Pentegra's Scott Stone
- Measuring and Monitoring OCIO Performances
- Structuring the OCIO Agreements with Consultants and Money Managers