Employees' Retirement Fund of the City of DALLAS

Next Generation Manager Open House

Event Review
April 4, 2016

April 12, 2016

Employees' Retirement Fund of the City of DALLAS

ERF Dallas Next Generation Open House – April 4, 2016

- Third Open House event sponsored by ERF Dallas
- Held during the TEXPERS Annual Conference at The Sheraton Dallas
- Purpose of the ERF NGM Open Houses
  - Support diversity and inclusion within both ERF and the broader investment management community
  - Provide transparency and access
  - Invite accomplished speakers with diverse backgrounds to give helpful insight on their professional journey and building their respective businesses
  - ERF Open Houses provide an opportunity to learn about our organization, investment goals, and the process by which we search for, select, and monitor investment managers
- The event began with a welcome by ERF Chair John Jenkins, followed by two panel discussions led by Cheryl Alston and Natalie Jenkins Sorrell
- Wilshire Consulting was in attendance
- Approximately 140 attendees
- Survey sent to event participants to provide constructive feedback
- True ERF team effort

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Open House Sessions

SESSION 1: ERF Next Generation Managers – Investment managers shared their experiences acquiring and managing institutional assets and how they have successfully grown their businesses

Wendell E. Mackey
Founder,
Channing Capital Management

JoAnn H. Price
Co-Founder & Managing Partner,
Fairview Capital

Michael Torres
CEO,
Adelante Capital Management

SESSION 2: The Search for Next Generation Managers – Institutional investors and consultants discuss how they search for Next Generation Managers, in particular what they are looking for and how they allocate dollars in this space

Cherrise Cederqvist
Vice President,
Prudential Securities

Sharmila Kassam
Deputy CIO,
Employees Retirement System of Texas

Jason Lamin
Founder & Managing Partner,
Lenox Park Solutions

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ERF Open House in Pictures

Employees' Retirement Fund of the City of DALLAS

The Open House in Pictures

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Next Open House Events at ERF Dallas Offices

- Thursday, September 15, 2016
- Thursday, November 10, 2016