

2020 JFNA Investment Institute Mini Draft Program



March 24-26, 2020 | Palm Beach Gardens, FL

Tuesday, March 24, 2020

- 3:00 – 4:00 pm: Registration and Check-In
- 5:00 – 6:00 pm: Cocktail Reception
- 5:45 – 6:00 pm: Welcome/Opening Remarks
- 6:00 – 7:00 pm: How Did Israel Become a Hub for Innovation?
- 7:00 – 9:30 pm: VIP and Sponsor Dinners

Wednesday, March 25, 2020

- 7:30 – 8:30 am: Breakfast – Table Topics
- 8:30 – 8:45 am: Welcome
- 8:45 – 9:30 am: Fireside Chat with JFNA and JFN
 - Moderator: Suzanne Barton Grant**
 - Panelists: Eric Fingerhut (JFNA, President and CEO)**
Andres Spokoiny (JFN, President and CEO)
- 8:45 – 9:45 am: Investment Outlook: American Preeminence in a Rattled World
 - Sharmin Mossavar-Rahmani (Chief Investment Officer, Goldman Sachs)**
- 9:45 – 10:45 am: From Aid to Investment: New Models in Development Finance or (Re)Investing Israel's Capital Markets: Financing the Transition from Startup Nation to Global Nation
 - Moderator: Glenn Yago (Senior Fellow; Founder, Financial Innovations Labs, Milken Institute)**
- 10:45 – 11:00 am: Break
- 11:00 – 12:00 pm: Social Entrepreneurship: The Case for Definition
 - Moderator: Sari Miller (Sarjay Capital)**
- 12:00 – 1:00 pm: Best Practices for Investment Committee Governance: Making the Case for Ethical Investing
 - Moderator: Cathleen Rittreiser (Executive Director, Commonfund Institute)**



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Wednesday, March 25, 2020-continued

12:00 – 1:30 pm: Networking Luncheon – Table Topics

1:30 – 2:15 pm: Breakout Sessions:

Breakout 1A: ESG, SRI, and Impact Investing: What's the Difference?

Breakout 1B: The Case for an Outsourced Chief Investment Officer (OCIO)

Breakout 1C: Leveraging Your IPS to Align Your Mission and Values

2:30 – 3:15 pm: Breakout Sessions:

Breakout 2A: How to Achieve Optimal Asset Allocation

Breakout 2B: The Thriving AI Landscape in Israel and What it Means for Global AI Competition

Breakout 2C: Israeli Innovation: Creating Impact through Investments

3:15 – 3:45 pm: Networking Break

3:45 – 4:30 pm: Looking to Civil Society for the Values that Shape a Culture

4:30 – 5:15 pm: Global Landscape and Risk of Recession

5:15 – 6:15 pm: A View from Washington

Libby Cantrill (Head of Public Policy, PIMCO)

6:15 – 7:00 pm: Cocktail Reception

7:00 – 9:30 pm: Sponsored Dinners



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Thursday, March 26, 2020

7:30 – 8:45 am: Breakfast – Possible Table Topic Discussions

8:45 – 9:00 am: Welcome

Michael Hoffman (CEO, Palm Beach County Federation)

9:00 – 9:45 am: Understanding the Metrics of Impact

Jeff Cohen, Institutional Product Strategist SASB (Sustainability Accounting Standards Board)

9:45 – 10:30 am: Ways to Leverage Impact

10:30 – 11:00 am: Balancing Your Investment and Impact Goals

Jackie VanderBrug (Managing Director and Investment Strategist, U.S. Trust)

Joel Wittenberg (CIO, Kellogg Foundation)

Beth Sirull (President/CEO, Jewish Community Foundation of San Diego)

11:00 – 12:00 pm: The Dire Art of Disagreement

Bret Stephens Op-Ed Columnist, The New York Times

12:15 – 1:15 pm: Networking Lunch – Town Hall Meeting

1:15 – 1:30 pm: Closing Remarks