

Overseeing Institutional Assets: Effective Processes, Good Results

April 19, 2006

Agenda

Speakers

Don Trone
President
Center for Fiduciary Studies

Gary M. Silverman, CFA
Chief Investment Officer
Blue Prairie Group

Matt Gnabasik
Managing Director
Blue Prairie Group

Debbie Kobak
Business Development Officer
Mission Based Deposits
ShoreBank

8:00-8:30	Registration and Breakfast
8:30-8:45	Welcome <i>John Savas, Practice Leader Blue Prairie Group</i> <i>Clare Golla, Nonprofit Market Strategist, Mission Based Deposits ShoreBank</i>
8:45-9:30	Defining a Standard of Excellence for Foundations and Endowments Don Trone, President Center for Fiduciary Studies Don Trone will review fiduciary best practices of investment committee members and how to self-assess whether an investment committee meets a newly released, global fiduciary standard of excellence.
9:30-10:15	Developing an Effective Investment Policy Statement Matt Gnabasik, Managing Director Blue Prairie Group A well designed IPS is a cornerstone of a sound investment process. Matt Gnabasik will discuss the essential components of an IPS and show how an IPS, if used properly, can greatly help committees in the decision-making process.
10:15-10:30	Break

10:30-11:15

Prudent Investment Implementation

Gary M. Silverman, CFA, Chief Investment Officer
Blue Prairie Group

There are several simple truths you need to know to effectively manage your institution's assets. For many, these truths stay hidden, even in the wake of professional advice. Gary Silverman will uncover these truths and explain the impact they have on the prudent implementation of your institution's portfolio, and discuss why most of the investment industry doesn't want you to know them. Understanding these truths will help you identify areas where your approach to investment oversight can be improved.

11:15-11:35

Mission Based Investing

Debbie Kobak, Business Development Officer
Mission Based Deposits, ShoreBank

What is mission based investing and how can you do it? Debbie Kobak will provide an overview of terms and discuss the evolution of mission related investing within the broader context of socially responsible investing. She will give specific examples of investment vehicles which provide a market rate of return while maintaining a direct relation to the social purpose of nonprofit organizations.

11:35-11:45

Break

11:45-12:45

Lunch / Investment Policy Statement Workshop

Matt Gnabasik, Managing Director of Blue Prairie Group will facilitate a working lunch to help you improve or develop an IPS. If you have an existing IPS, please bring it, we will help you make it better. If you don't already have an IPS, this luncheon workshop presents a great opportunity to work on developing one.

12:45-1:00

Wrap-up

John Savas, Practice Leader Blue Prairie Group

With equity market returns forecast to be below historical levels, private donations at record lows and an ever-increasing focus on proper fiduciary oversight, there has never been a greater need for a disciplined approach to the stewardship of your organization's assets.

**When
Where**

Wednesday, April 19 2006
from 8:00 a.m. to 1 p.m.
half-day seminar

Lake Room, University Center
525 S. State Street
Chicago, Illinois 60605

Click

Register

or go to www.blueprairiegroup.com
click on events > upcoming events

or e-mail sue.wang@blueprairiegroup.com
or call Sue at 312-376-8437