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SESSIONS AGENDA

TUESDAY, SEPTEMBER 3, 2024

6:00 pm – 6:15 pm:

Welcome and Opening Remarks

6:15 pm – 7:30 pm:

Session 1: Keynote Address

WEDNESDAY, SEPTEMBER 4, 2024

8:00 am – 9:00 am:

Session 2: World on Fire – Understanding Geopolitical Risks and Opportunities

With hot wars igniting and international tensions rising around the globe, political risk underlies even domestic investment. Investment strategists discuss how pension fund trustees can map potential impacts in their portfolios, hedge against negative effects, and provide long-term protection for their beneficiaries.

9:00 am – 10:00 am:

Session 3: Election 2024

This year's elections will have far-reaching influence for institutional investment, financial regulation, corporate governance, and portfolio management. From Washington, DC to the state houses, American politics is realigning under our feet, perhaps creating tectonic shifts for pension fund policies and expectations. Keen political observers offer insights and predictions on what this year's elections will mean for you.

10:00 am – 10:15 am:

Networking Break

10:15 am – 11:00 am:

Session 4: The Death of Passive Management

From voting proxies to company engagement, from divestment mandates to securities litigation strategies, pension funds are increasingly pressured to be active owners in their portfolios. How public fund fiduciaries are rising to the challenge and employing new tools and technologies to act as stewards for the capital markets.

11:00 am – 12:00 pm:

Session 5: Shareholder Litigation

Leading securities lawyers and fund managers present case studies on the successful use of securities litigation by pension funds to improve returns, reduce risk, and repair troubled companies in their



12:00 pm – 1:00 pm
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portfolios.

Lunch

1:00 pm – 2:00 pm:

Session 6: Leadership and Happiness

According to research, to be successful in life, one should understand the importance of happiness and manage it appropriately. Social scientists have shown that there is an enormous opportunity for leaders to improve happiness practices in their organizations, thereby raising workplace engagement, facilitating recruitment, and increasing retention and productivity. This session explores the methods by which institutions can establish a culture of meaning, purpose, and life satisfaction, and prosper in highly competitive labor markets where culture and quality of life are so critical.

2:00 pm – 3:00 pm:

Session 7: Investing in Genius – The Good, the Bad, and the Ugly of Founder-Driven Firms

The top ten of the world's richest people are the creators of some of the companies with the best returns in the market. We examine what to watch out for when investing in the growth stocks that lead the indexes and that everyone needs in their portfolios.

3:00 pm – 4:00 pm:

Session 8: In-Depth Breakout Sessions

1: General Counsel Roundtable – Veteran general counsel discuss hot topics and share insights on legal issues facing public funds.

2: Art of the Chair – Top experts provide tips and training on how to chair boards and other organizations with equity, efficiency, and effectiveness.

3: Personalizing AI – Experts demonstrate how pension funds can use AI and other technology to provide an expanded range of personalized services to their beneficiaries.

THURSDAY, SEPTEMBER 5, 2024

8:00 am – 9:00 am:

Session 9: Best Practices in Fund Governance

Pension fund leaders share innovative insights and information on such topics as boardroom politics, trends in funding, operations management, and stakeholder accountability.

9:00 am – 9:45 am:

Session 10: “Mind Blowing” – AI Revisited



Earlier this year, Tyler Perry stunned the public when he paused plans to build a new \$800 million studio set near Atlanta. The reason? He saw a “shocking” demo of Sora – a new content-creating AI system from OpenAI – and immediately saw that near-Hollywood quality content could be created instantly with a few keystrokes. AI was said to be coming. Just one year later, it seems to have arrived everywhere.

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9:45 am – 10:00 am:

Networking Break

10:00 am – 11:00 am:

Session 11: Trends to Watch in Governance and Investing

Experienced fund leaders and investment experts discuss emerging issues for public pensions, including developments in responsible investing, boardroom practices, and new focus points of systemic risk.

11:00 am – 12:10 pm:

Session 12: Closing Remarks

12:30 pm – 5:30 pm:

Networking Activities: Pickleball Tournament, Painting on Canvas, Charcuterie Board, and Whale Watching.

2024 PUBLIC FUNDS FORUM
MONTAGE LAGUNA BEACH, CALIFORNIA
SEPTEMBER 3-5, 2024

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