Richard M. and Helen DeVos Center for Entrepreneurship & Innovation
Grand Valley State University

FEFO

Foundations Endowments Family Offices

Asset Allocation and Spending Policies: Managing Expectations in a Stormy Environment

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Friday, December 2nd, 2016
8:30am - 12:00pm
L.V. Eberhard Center
Grand Valley State University

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AGENDA

8:30am-9:00am	**Breakfast and Registration**
9:00am-9:15am	**Welcome & Introductions** Diana R. Lawson, Ph.D., Dean of the Seidman College of Business Carrie Boer, Treasurer and Director Peter C. & Ernajean Cook Foundation Jennifer L. Remondino, Partner, Warner Norcross & Judd LLP
9:15am-10:30am	**Pay Out Sustainability** **Bruce Myers**, Managing Director Cambridge Associates **Spending and Gifting Policy: A Foundation's Approach** **Randy A. VanAntwerp,** Director of Financial Operations Frey Foundation **Fiscal Policy: A Bank's Perspective** **John Augustine**, Chief Investment Officer Huntington Bank **GMO Pillars: Concepts and Core Beliefs** **Peter Chiappinelli,** Portfolio Strategist GMO Asset Allocation Team
10:30am-11:00am	**Networking Break**
11:00am-12:00pm	**Questions and Answers: Moderated by Jennifer L. Remondino**
12:00pm	**Closing Remarks**

SPEAKERS

John Augustine - Chief Investment Officer, Huntington Bank

John has spent the last 25 years as an investment manager, investment strategist and economic strategist for various financial institutions. He joined Huntington in May 2014 as the Chief Investment Officer. Huntington is headquartered in Columbus, Ohio and has over $17 billion in assets under management. Prior to joining Huntington, John was with Fifth Third Bank in Cincinnati for 16 years holding various roles, including senior portfolio manager, mutual fund manager, equity team leader, investment strategist and economic strategist.

Peter Chiappinelli - Portfolio Strategist, GMO Asset Allocation Team

Mr. Chiappinelli is a member of GMO's Asset Allocation team. Prior to joining GMO in 2010, he was an institutional portfolio manager on the asset allocation team at Pyramis Global Advisors, a subsidiary of Fidelity Investments. Previously, he was the director of institutional investment strategy and research at Putnam Investments. Mr. Chiappinelli earned his MBA from The Wharton School at the University of Pennsylvania and his B.A. from Carleton College. He is a CAIA charterholder, and was the founding President of the CAIA Boston chapter. He is a CFA charterholder.

Bruce Myers - Managing Director, Cambridge Associates

Bruce has served as the co-head of Cambridge Associates Capital Management since 1994. Previously, he was vice president of portfolio management at NationsBank from 1982-1992. He attended Princeton University from 1975-1979, and obtain a Juris Doctor from Washington and Lee School of Law in 1982. Bruce then went on to earn an MBA from The Tuck School of Business at Dartmouth College in 1994.

Randy VanAntwerp - Director of Financial Operations, Frey Foundation

Randy Van Antwerp has served as Director of Financial Operations for the Frey Foundation since February 2014. The Frey Foundation based in Grand Rapids is a private family foundation with a assets of $140 million. Randy is responsible for financial planning, management of accounting and investment procedures, regulatory compliance, budget and reporting. Prior to coming to the Frey Foundation Randy worked as the CFO for the Grand Rapids Art Museum and Foundation. Randy received an MBA from Grand Valley State University and a bachelor's degree in business from University of Michigan.