



Northern Trust

**2015 FIA Conference for Nonprofit Organizations
October 1, 2015**

EVENT AGENDA

10:15 am – 10:45 am: Registration

10:45 am – 12 pm:

Panel Discussion: Market Outlook & Impact on Nonprofits (B6 Assembly Room)

Moderator: Mac MacLellan- President and Chief Executive Officer, Wealth Management, Central Region, Northern Trust

- Carl Tannenbaum- Chief Economist, Northern Trust
- Jim McDonald- Chief Investment Strategist, Northern Trust

Carl will provide a general outlook on the current state of the economy and Jim will provide comments that focus on the current state of the financial markets and the implications for nonprofits.

12:00 – 1:30 pm:

Lunch and Keynote Address

- Raymond C. Odom, JD, CFP- National Director of Wealth Transfer Services, Northern Trust

1:30 – 1:45 pm: Break

1:45 – 2:45 pm:

Panel Discussion: Alternatives & Private Equity Investing

Moderator: Thomas Kirkenmeier, Senior Vice President and Senior Investment Officer - Foundation & Institutional Advisors, Northern Trust

- Braden Waverley- General Manager, ABW Holdings, LLC & DuPage Community Foundation
- Robert Morgan- Managing Director, 50 South Capital

Private equity's unique risk and return characteristics can potentially enhance long-term capital growth and portfolio diversification. Long term investors looking to outperform the public markets on a risk-adjusted basis through exposure to a universe of private companies should consider an allocation to both buyout and venture capital strategies. This session will feature Northern Trust's head of Alternatives and an "early stage" debt and equity investor, and will explore the mechanics of investing, sources of return compared to public markets and what is important for your organization to understand before investing in a limited partnership structure.

1:45 – 2:45 pm:

Panel Discussion: Engaging Next Generation Donors & Leaders- Insights from the Field

Moderator: Tim Bresnahan, Associate Director- Philanthropic Advisory Services, Northern Trust

- Alexis Sutton- Senior Program Officer, Community Affairs, Northern Trust
- Jason Baxendale, MBA, JD- Senior Director of Planned Giving, Chicago Community Trust
- Katherine Groninger, PhD- Philanthropic Advisor, Major Gifts, Art Institute of Chicago

By some estimates, \$30 - \$40 trillion will transfer from the “Baby Boom” generation to younger generations over the next 40 years. For many in these rising generations, philanthropy and social impact are not just important side projects, they are fundamental to how younger generations approach work and life. This session will include a conversation with representatives from various segments of the philanthropic sector to provide insights into what nonprofits can and should be doing to engage next generation philanthropists to build meaningful and lasting relationships.

2:45 – 3 pm: Break

3- 4 pm:

Panel Discussion: Getting Your Board on Board- Empowering your Board to be Ambassadors for your Organization

Moderator: Marguerite Griffin, National Director of Philanthropic Services, Northern Trust

- Eric Weinheimer, President & Chief Executive Officer, Donor’s Forum
- Lisa Morrison Butler- Commissioner of the Department of Family & Support Services, City Year Chicago
- Dorri McWhorter- Chief Executive Officer, YWCA Metropolitan Chicago

Donor stewardship and sustainability have become two of the most compelling challenges for nonprofit organizations. Maintaining a fully-engaged board of directors is critical to success and the adage “all hands on deck” has never been more meaningful. Whether you’re facing the challenge of setting expectations for board engagement or encouraging the board’s participation in fundraising, it’s essential that every board member be “on board”. This panel will explore strategies and practices to ensure that every board member is empowered to be an ambassador for your organization.

3- 4 pm:

Panel Discussion: How can I SRI?

Moderator: Ophelia Barsketis- Senior Portfolio Manager, Foundation & Institutional Advisors, Northern Trust

- Duane Roberts, CFA- Director of Equities, Dana Investment Advisors
- Jordan Dekhayser- Portfolio Manager, Global Index Management, Northern Trust
- Sally Giegerich- Senior Portfolio Manager, Northern Trust

Values-based investing has grown dramatically in recent years. Firms and investors have found success incorporating environmental, social and corporate governance (ESG) and socially responsible investing (SRI) factors into the investment process. But what are the risks and challenges? And who is participating? Hear from our experts as they explain and illustrate ESG and SRI, and why they matter.

4 – 5 pm:

Panel Discussion: Building a Sustainable Organization- Best Practices for Diversifying and Managing Revenue Sources

Moderator: Marguerite Griffin, National Director of Philanthropic Services, Northern Trust

- Ricardo Estrada- President & Chief Executive Officer, Metropolitan Family Services
- Julie Hoffman- Managing Director, A Better Chicago
- Danya Rosen- Chicago Executive Director, Peer Health Exchange

The economic and political climates in Illinois and surrounding states have presented serious challenges for nonprofit organizations seeking to implement long-term funding strategies. Many nonprofit organizations have experienced success by diversifying funding sources through new business ventures and social enterprises, sponsorships, social media campaigns and innovative programs. At the same time, effectively managing multiple, highly diverse revenue streams can be challenging for even those organizations that are stable and positioned well for growth. This panel will explore several considerations and strategies for diversifying revenue sources and managing the ones you have. This panel will include nonprofit executives and funders.

4 – 5 pm:

How Cyber Security Effects Nonprofits

- Kevin Novak- Chief Information Security Officer, Northern Trust
- William Barouski- Deputy Chief Information Security Officer, Northern Trust

The issue of cybersecurity has drawn considerable attention and is arguably one of the most critical risk issues the U.S. faces today. With attacks escalating and data breaches impacting millions, cyber is both a national and local issue as data breaches affect all organizations. While the majority of attacks have focused on for profit organizations, military, and governments, many associations and nonprofits are seeing attempts to compromise valuable information. When it comes to storing valuable information, including employee data, credit card information and member information, nonprofit organizations are challenged with fending off cyber challenges with limited resources.

This session will feature Northern Trusts' heads of information security and discuss challenges facing nonprofits, relay 'cyber' stories, and share what leaders should know and what they can do to protect their business.

5 – 6 pm:

Cocktail Reception (B6 Assembly Room)