

Foundation Forum: Issues in Investment Management
for North Carolina's Philanthropic Leadership

Grandover Resort and Conference Center, Greensboro, NC

Wednesday, January 7, 2004

Registration and Continental Breakfast begin at 7:30 a.m.

Program begins at 8:30 a.m., includes lunch, and concludes at 4:30 p.m.

In many ways, the principles that guide the Treasurer's public pension fund investments decision are the same as those for charitable foundations: a long-term approach that provides broad portfolio diversification in order to provide conservative risk management and relatively consistent levels of performance.

The State Treasurer is convening this invitation-only, free day-long session for the senior leadership of the state's largest charitable foundations (those with assets of \$5 million or more) for presentations, dialogue and candid commentary on those issues of greatest importance in the safe, prudent management of these philanthropic assets. Capitalizing on the "honest broker" role that made the *Women & Money* and *Ministers & Money* so successful, Treasurer Moore is hosting this event to foster a sales-pitch free environment where best practices are discussed and shared freely among peers.

Among the topics be considered for presentations:

- ✓ A state of the State's review and analysis of North Carolina's charitable foundations;
- ✓ An overview of the trends and developments in various asset classes;
- ✓ Properly evaluating the performance of your asset managers;
- ✓ Examination of roles and responsibilities of boards and staffs in executing fiduciary duty;
- ✓ How to determine what asset allocation model is best for your foundation.

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