



*You are invited to the....*

## ***CIWM Summer Quarter Board Meeting and Speaker Event***

**Wednesday, July 14, 2010**

**Executive Commons, The Paul Merage School of Business**

New Member Orientation (3:00 pm)

Board Meeting (3:30 pm)

- Welcome & Introductions – Rick Keller
- Merage School update – Andy Policano
- Co-Chair report – Rick Keller
- Committee reports
  - Membership – Mark Moehlman & Kimberly Bernatz
  - Investment Programs – Joe Volz
  - Wealth Management Programs – Camille Jayne & David Young
  - Professional Programs – Shaun Skeris
  - Polaris Competition – Michael Cancelleri

Panel Presentation (5:15 pm)

***Updated Thinking on Asset Allocation:***

***The Endowment Model vs Balanced Portfolio Model***

James Hillman, Managing Director Portfolio Management, BNY Mellon

John Langston, Regional Manager, The Endowment Fund

Jamshaud Zovein, Managing Director, Nuveen Alternative Investments

Networking Reception (6:15 pm)

Please contact Cristina Surpless at [csurp@uci.edu](mailto:csurp@uci.edu) or 949.824.4835 with any questions