100 women in hedge funds

Education Session No. 445:
Outlook and Macro Trends for 2014: Women Investment Managers

January 15, 2014 at 6 PM
San Francisco, CA

With investors hanging their hats on every word from the Central Bankers, the global investment environment remains as dynamic and challenging as ever. What are the lessons learned from the crisis? Are there signs of new bubbles? Where do we find investment ideas in anticipation of the great Fed unwind? What is the key to investor communications in this challenging market environment?

Our powerful assembly of women leaders from hedge funds, mutual funds, and asset allocators in the Bay Area will set the course in some new directions in 2014. Join us for a lively dialogue and consider the panelists' myriad insights.

Participants

Margaret Jadallah, Bivium Capital Partners
Serena Perin Vinton, CFA, Franklin Advisers, Inc.
Anjun Zhou, Mellon Capital Management
Sue Thompson, ***Moderator***, BlackRock

Event Details

Date: January 15, 2014
Time: 5 PM Registration.
We will begin *promptly* at 6 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.
Networking and cocktails prior to session.
Hosts: iShares and Blackrock
Location: Blackrock
400 Howard Street, 8th Floor, **San Francisco**, CA 94105
RSVP: RSVP Now

If you have any questions about this event, please contact the California, North committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission is free, but there is a $25 charge if you register and do not attend, even if you cancel in advance. No-show proceeds will be donated to the 2014 beneficiary of 100WHF's US philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your Member Profile

Space is limited. No walk-ins will be permitted.

Biographies

Margaret Jadallah, Managing Director, Bivium Capital Partners
Margaret is Managing Director and Director of Manager Research at Bivium. She is responsible for directing the firm's manager research and due diligence effort across products and asset classes. Her responsibilities at the firm also include client servicing, portfolio construction assistance, manager performance monitoring, and new product development.

Margaret has over 20 years of investment experience, the majority of which has been spent performing due diligence on hiring and monitoring investment managers in all traditional asset classes. Prior to joining Bivium in December 2008, she was a Principal at Harris myCFO where she was a consultant to ultra high net worth individuals on both traditional and alternative investments. Before that, she spent 13 years as Director of Manager Research at Strategic Investment Solutions where she helped place over $10 billion of assets with external managers and also served as a generalist consultant to several of their plan sponsor clients. Prior experience includes four years at Callan Associates as Vice President in their Manager Research group.

Margaret served on the board of San Mateo County Employees' Retirement Association where she was chair of their Investment Committee. She currently serves on the Finance and Investment Committee of San Francisco Education Fund.

Margaret has a BA in Economics from Smith College and a MBA in Finance from Haas School of Business, UC Berkeley.

Serena Perin Vinton, CFA, Senior Vice President, Portfolio Manager, Franklin Advisers, Inc.
Serena Perin Vinton is a senior vice president and portfolio manager with Franklin Equity Group and portfolio manager of Franklin Growth Fund.

Ms. Perin Vinton joined Franklin Templeton Investments in 1991. She served as an analyst and portfolio manager in the international fixed-income group for four years before joining the Franklin Equity Group in 1995. Her prior equity research responsibilities include analysis of the consumer products and household goods, specialty retail, apparel/footwear/textiles, paper and forest products, building materials and steel industries.

Prior to joining Franklin Templeton, Ms. Perin Vinton worked as a research assistant for a British Member of Parliament in London.

Ms. Perin Vinton earned her B.A. in business economics from Brown University. She is a Chartered Financial Analyst (CFA) Charterholder and is a licensed registered securities representative. Ms. Perin Vinton is a member of the CFA Institute.

Anjun Zhou, Managing Director, Head of Multi-Asset Research, Mellon Capital Management
Dr. Zhou has over 12 years of investment experience as an asset allocation specialist. She is currently responsible for the design, development and enhancement of investment strategies and solutions, and providing leadership to the central research group across all asset classes.

Prior to joining Mellon Capital, Anjun spent nearly a decade in roles developing new quantitative research and products in the multi-asset class area. Anjun was an executive director of global macro and asset allocation at Morgan Stanley, and responsible for research and product development for GTAA institutional accounts and retail funds. Prior to Morgan Stanley, she was vice president at Deutsche Asset Management, responsible for developing quantitative strategies in the multi-asset class framework for the Quantitative Strategies Group and a proprietary trading and hedge fund group. Previously, she served as principal at State Street Global Advisors, responsible for quantitative research and product development for global active strategies in multiple asset classes.

Anjun has authored a number of publications on volatility modeling, innovative approach on stock selection and studies on market economy. Anjun is quoted for her asset allocation expertise in publications such as in the Wall St. Journal, Reuters, Global Finance and The Street, and has been interviewed on Reuters TV and Bloomberg Radio. She earned her Ph.D. in Finance from the University of Illinois at Urbana-Champaign, and she earned an M.A. in International Finance and Economics, and a B.A. in Business Administration from Peking University.

Sue Thompson, Managing Director, BlackRock
Sue Thompson, Managing Director, is Head of the Institutional Asset Management/RIA Channel, overseeing the firm's iShares sales efforts with asset managers, ETF Investment Strategists, registered investment advisors and family offices.

Prior to joining BGI in 2007, Ms. Thompson was a principal at Vanguard, heading the national sales team focused on national full service brokerage firms. She joined Vanguard in August 1999 as Senior Counsel, specializing in tax law and structured products. Prior to joining Vanguard, Ms. Thompson was an attorney at Orrick, Herrington & Sutcliffe, LLP in California, specializing in public finance.

Ms. Thompson received her B.A. in Accounting from the University of Washington and J.D. from the University of California, Davis. She is also a C.P.A. and holds her Certified Investment Management Analyst (CIMA) designation through the Investment Management Consultants Association in conjunction with the Wharton School at the University of Pennsylvania.

About iShares
iShares is the global product leader in exchange traded funds with over 600 funds globally across equities, fixed income and commodities, which trade on 20 exchanges worldwide. The iShares Funds are bought and sold like common stocks on securities exchanges. The iShares Funds are attractive to many individual and institutional investors and financial intermediaries because of their relative low cost, tax efficiency and trading flexibility. Investors can purchase and sell shares through any brokerage firm, financial advisor, or online broker, and hold the funds in any type of brokerage account. The iShares customer base consists of the institutional segment of pension plans and fund managers, as well as the retail segment of financial advisors and high net worth individuals.

About Blackrock
BlackRock serves institutional, retail and high net worth investors in more than 100 countries through the efforts of professionals located in 27 countries. We strive to leverage the breadth of our global investment expertise and scale, together with our deep understanding of local requirements and business customs, to serve our clients most effectively. Portfolios may be invested in local, regional or global capital markets. Products may be structured to address location-specific issues, such as regulations, taxation, operational infrastructure and market liquidity, and client-specific issues, such as investment policy, liability structure and ratings.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 12,000 alternative investment management investors and professionals through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 400 education events globally, connected more than 250 senior women through Peer Advisory Groups and raised over $33 million for philanthropic causes in the areas of women's health, education and mentoring.