Education Session No. 599:
2016: Where will the markets lead us?

February 11, 2016 at 6 PM
San Francisco, CA

What a wild ride in the markets! Will the near-daily significant swings continue? How does the choppy market impact investor sentiment for the short-term and the long haul? Which asset classes can assist in managing the wild ride? Where are values emerging? Get up-to-the minute insights and forecasts on asset allocation, fixed income and hedge funds from our women portfolio managers. Bring your questions regarding specific asset classes and the outlook for diverse industries.

Participants

Wendy M. Cromwell, CFA, Wellington Management
Teresa Kong, Matthews Asia
Heather Loomis Tighe, BlackRock
Lisa O'Connor, State Street Advisors
Shelley Orjuela, ***Moderator***, GLG (Gerson Lehrman Group, Inc.)

Event Details

Date: February 11, 2016
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: BlackRock and GLG (Gerson Lehrman Group, Inc.)
Location: 400 Howard Street, **San Francisco**, CA 94111 - Directions
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 beneficiary of 100WHF's most recent 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

Wendy M. Cromwell, CFA, Partner, Director, Asset Allocation Strategies, Wellington Management
As director of our Asset Allocation Strategies Group, Wendy leads the development of asset allocation solutions for the firm's global client base. She and her team conduct research on long-term asset allocation themes, including capital market expectations and issues of overall portfolio structure, in order to assist clients with long-term strategy and policy issues. In addition, Wendy manages market neutral and real return portfolios as well as customized solutions for clients seeking specific risk/return objectives. She is an author of papers on topics concerning investment policy development, risk analysis, and the role of specialized asset classes in portfolios. She is also a member of the Compensation Committee, Hedge Fund Review Group, and Equity Review Group, and serves on the Advisory Board of the Wellington Women's Network.

Prior to joining Wellington Management in 1996, Wendy was a president's associate at Harrah's Entertainment (1995 - 1996).

Wendy received her MBA, with honors, from Vanderbilt University (Owen, 1995) and her BBA, summa cum laude, from the University of Mississippi (1993). She also holds the Chartered Financial Analyst designation.

Teresa Kong, Portfolio Manager, Matthews Asia
Teresa Kong is a Portfolio Manager at Matthews Asia and manages the firm's Asia Strategic Income and Asia Credit Opportunities strategies. Prior to joining Matthews Asia in 2010, she was Head of Emerging Market Investments at Barclays Global Investors, now known as BlackRock, and responsible for managing the firm's investment strategies in Emerging Asia, Eastern Europe, Africa and Latin America. She developed and managed strategies spanning absolute return, active long-only and exchange-traded funds. In addition to founding the Fixed Income Emerging Markets Group at BlackRock, she was also Senior Portfolio Manager and Credit Strategist on the Fixed Income credit team. Previously, Teresa was a Senior Securities Analyst in the High Yield Group with Oppenheimer Funds, and began her career with JP Morgan Securities Inc., where she worked in the Structured Products Group and Latin America Capital Markets Group. She received both a B.A. in Economics and Political Science and an M.A. in International Development Policies from Stanford University. She speaks Cantonese fluently and is conversational in Mandarin. Teresa has been a Portfolio Manager of the Matthews Asia Strategic Income Fund since its inception in 2011.

Heather Loomis Tighe, Managing Director, BlackRock
Heather Loomis Tighe is a Managing Director and Co-Head of BlackRock's Institutional Endowments, Foundations and Family Office business for the West Coast and Western Canada. In addition, Heather serves as the Market Strategist for the group nationally.

Prior to BlackRock, Heather was a Managing Director at JPMorgan, responsible for the Fixed Income Private Banking business on the West Coast and South, overseeing over $15 billion assets. Heather served on the Portfolio Construction Team and co-founded WISE, the Women's Insight Series.

Heather started her career as a proprietary equity trader at First New York Securities in Manhattan. She graduated Phi Beta Kappa from Duke University with a degree in Economics and Spanish. Heather has worked with the Natural Resources Defense Council for over a decade, chairing the SF Council for 5 years. She regularly appears on financial media and is quoted in the press. A native of Connecticut, Heather currently lives with her husband in San Francisco.

Lisa O'Connor, Head of Global Macro Portfolio Management, State Street Advisors
Ms. O'Connor joined State Street Global Advisors (SSGA) in 2013 as a Managing Director and member of the Senior Leadership Team. She is a founding member of SSGA's first Global Macro Hedge Fund and is Head of the Global Macro Portfolio Management team.

Ms. O'Connor has over 20 years of experience in global finance and investment management. Prior to SSGA she was a Managing Director at Mellon Capital Management where she was Head of the Active Fixed Income group. Ms. O'Connor also helped to launch Mellon Capital Management Group's flagship global macro fund in 2001 and served as a co-portfolio manager for over 12 years. In her role as Head of the Active Fixed Income group Ms. O'Connor managed a team of portfolio managers and researchers who invested approximately $7 billion in active strategies across global fixed income markets, including $2 billion in emerging market debt investments and more than $3 billion in hedge fund strategies.

Prior to Mellon she was a Fixed Income Portfolio Manager at Coutts Private Bank and an Equity Derivatives Analyst at Societe Generale.

Ms. O'Connor received a Masters of Business Administration from the University of California, Berkeley and a Bachelor of Arts in International Relations from University of California, Davis. She also earned the Chartered Financial Analyst (CFA) designation.

In 2015 - she was named one of the 50 leading women in hedge funds by the Hedge Fund Journal.

Shelley Orjuela, Director of Hedge Fund Business Development, GLG (Gerson Lehrman Group, Inc.)
Ms. Orjuela is a Director and Manager of GLG's New York Hedge Funds Business Development team. Prior to GLG, Ms. Orjuela served as a Vice President in Institutional Equity Sales at JP Morgan Securities, where she managed the Mid-Atlantic region. She began her Wall Street career as a fixed income analyst specializing in mortgage-backed securities. Ms. Orjuela received a Master's of Business Administration in Finance from New York University's Stern School of Business, and a Bachelor of Science in Psychology from Fordham University.

About BlackRock
BlackRock serves institutional, retail and high net worth investors in more than 100 countries through the efforts of professionals located in over 30 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 GLG (Gerson Lehrman Group, Inc.)
GLG (Gerson Lehrman Group, Inc.) is the world's leading platform for professional learning. Business leaders, investors, consultants, social entrepreneurs, and other top professionals rely on GLG to learn in short- and long-term engagements from a membership of more than 400,000 experts. Clients partner with GLG to address their most complex strategic challenges, make better business decisions, and advance their careers through conversations, mentorships, small group convenings, surveys, and other interactions-all within a rigorous compliance framework. Global, technology-driven, and nimble, GLG's approximately 1,000 employees work in 22 offices in 12 countries. For more information visit GLG.it.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)
100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over $38 million for philanthropic causes in the areas of women's and family health, education and mentoring.