

P&I | CONFERENCES

# Pension Risk Strategies

Post-Conference Report

ATLANTA  
OCT 2

DALLAS  
OCT 4

CHICAGO  
OCT 9

NEW YORK  
OCT 11



Prepared exclusively for:



# THANK YOU

Thank you for sponsoring P&I's Pension Risk Strategies Conference.

We hope you found the conference and media exposure an effective use of your time and budget, and that you formed valuable and profitable relationships with the conference attendees.

On the following pages, you'll find a brief recap of the conference and the additional benefits you received as part of your sponsorship package.

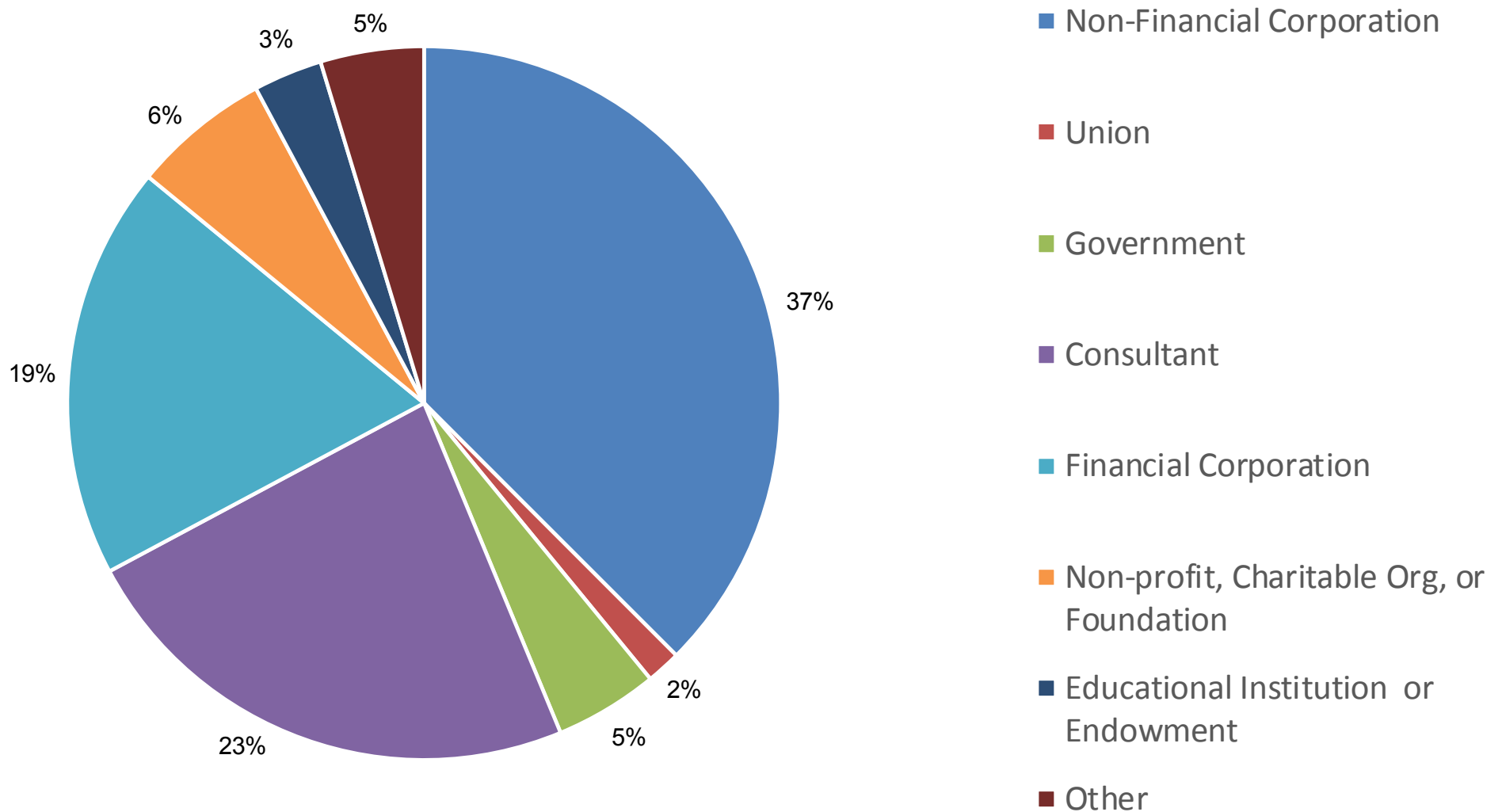
- I. Survey Results
- II. Attendee Analysis
- III. Verbatims
- IV. Marketing Recap



# SURVEY RESULTS

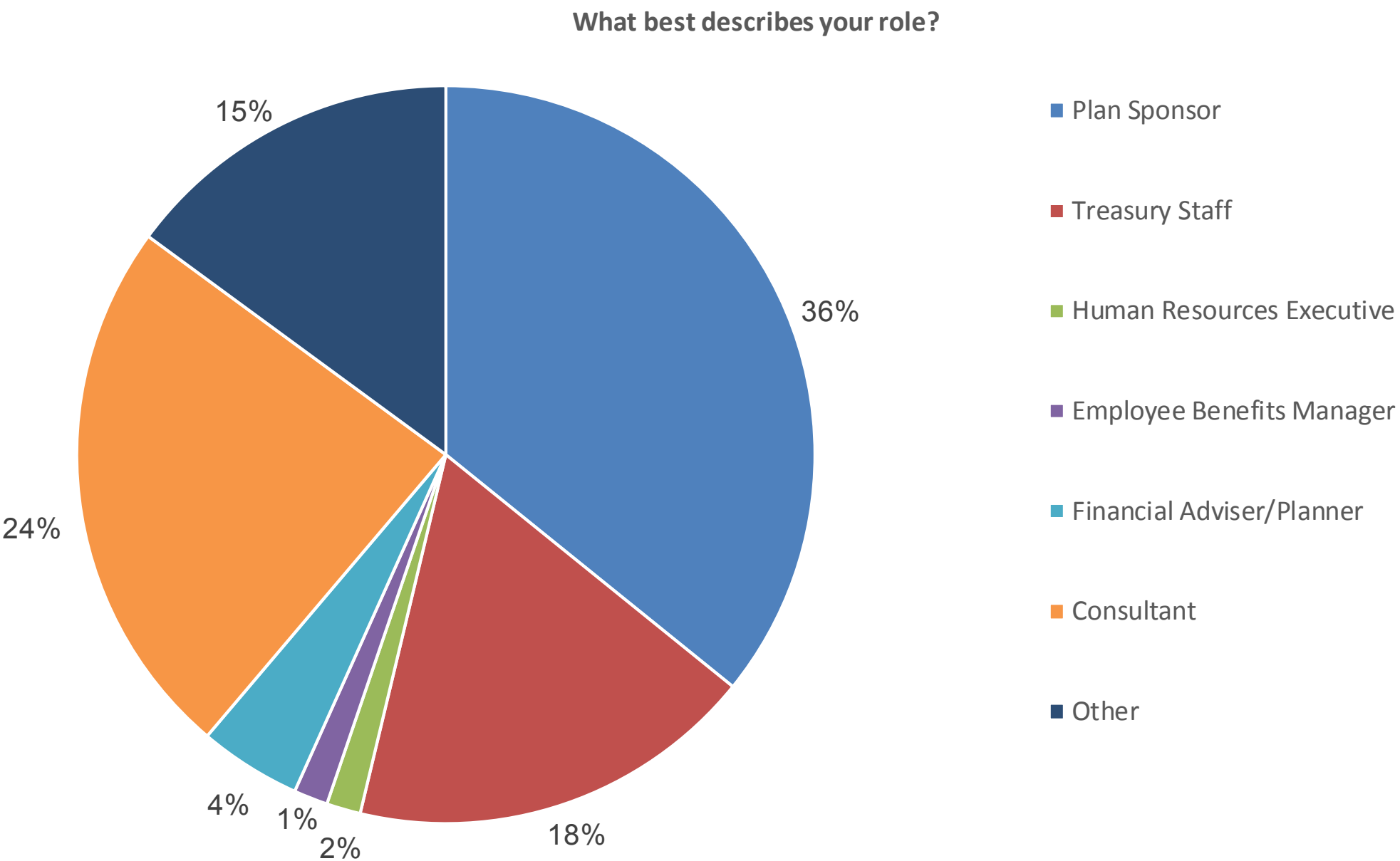
The survey results & verbatims contained in this report were collected from the completed surveys received from the conference. The surveys were submitted by attendees from the following types of firms/ companies:

**What best describes your company or firm?**



# ATTENDEE ANALYSIS

OVERALL PLAN SPONSOR TYPE



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# SURVEY RESULTS: GENERAL CONFERENCE

OVERALL SATISFACTION WITH THE FOLLOWING CONFERENCE ASPECTS:

**4.7** for the overall conference experience

**4.6** for the panel discussions

**4.7** for the session topics

**4.7** for the conference speakers and panelists

**100%** of conference attendees stated the conference met or exceeded their expectations

# SURVEY RESULTS

(on a 1-5 scale with 5 being Very Satisfied)

## PANEL:

### ECONOMIC AND REGULATORY CHANGES IMPACTING PENSION RISK MANAGEMENT

Atlanta: **rating 4.7**

Chicago: **rating 4.5**

Dallas: **rating 4.9**

New York: **rating 4.5**

#### Wayne Daniel

Atlanta: **rating 4.7**

Chicago: **rating 4.3**

Dallas: **rating 4.8**

New York: **rating 4.5**

## PANEL:

### BUILDING A PORTFOLIO FOR A PENSION RISK TRANSFER – HEDGING AND ASSET-IN-KIND TRANSFERS

Atlanta: **rating 4.6**

Chicago: **rating 4.7**

Dallas: **rating 4.8**

New York: **rating 4.6**

#### Jim Stevens

Atlanta: **rating 4.6**

Chicago: **rating 4.7**

Dallas: **rating 4.8**

New York: **rating 4.6**



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# VERBATIMS

“Great content and it was a very well managed event. There was an equal mix of panels and plan sponsors, which was great.”

“I am new to pension, so it was an extremely informative event to attend.”

“Overall solid topics and speakers.”

“The keynote was outstanding!”

“Great content and location.”

“Informative and engaging!”



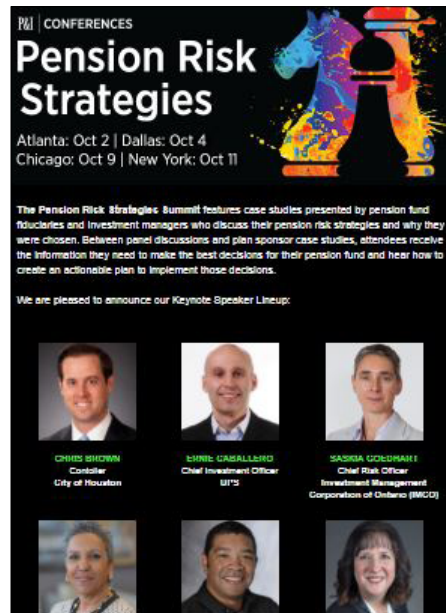
# MARKETING RECAP

MetLife will receive more than 2,629,743 potential media impressions over a 9 month period as part of their Pension Risk Strategies sponsorship.

**DIRECT MAIL PIECES:** POSTCARD, BROCHURE

**ONLINE:** CONFERENCE MICROSITE, BANNER ADS AND LINKEDIN

**11** PUSH EMAILS / **7** PRINT ADS



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## Pension Risk Strategies

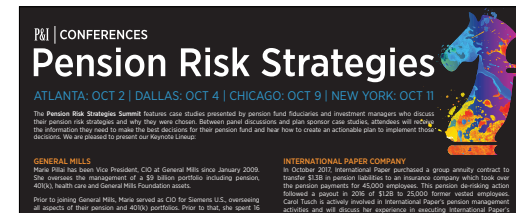
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complimentary registration at [pionline.com/RISK2018](http://pionline.com/RISK2018)



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EDUCATE, CULTIVATE, INFLUENCE...

The P&I conference model provides a variety of ways to reach your target audience, as well as a platform to showcase your expertise on specific topics of interest to fund executives:

PRINT

Supplement: Mass Reach readership of 135,000

LIVE

Conferences: Personal Reach in an exclusive and intimate setting

ONLINE

Webinar: Targeted Reach to fund executives who are looking for solutions

ADDITIONAL EXPOSURE

Email, direct mail, advertising in P&I (print & online), conference website

Your P&I Conference sponsorship allows you to enhance & elevate your message, putting the power of P&I to work for you at all levels.

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December 12, 2011      Pensioners.com      \$10.00 issue / \$279.00 year      **Print**

# Pensions & Investments

THE INTERNATIONAL NEWSPAPER OF MONEY MANAGEMENT

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**Hedge Funds**

## Large endowments grab healthy portfolio gains

Yale leads the pack, followed by Texas, California schools

**By Christine Williamson**

A glimpse into the secret world of large U.S. endowment funds reveals strong benchmarks and steady rising returns of their hedge-fund portions.

Just one of the 25 largest U.S. endowments provided publicly available detailed financial information for June 30, the fiscal year-end for many endowments. By examining that information, Pensioners & Investments found the six had a combined \$67 billion in assets as of June 30, of which \$18.4 billion was in hedge funds.

Harvard University, Cambridge, Mass., had the most total endowment assets — \$32 billion — but the smallest percentage hedge-fund allocation, 10% of assets.

University of Virginia, Charlottesville, with \$1.3 billion in its endowment assets, had the highest hedge-fund allocation — 70%.

Of the four that report aggregated hedge-fund portfolios, Yale's fund portfolio performed the best with a 12.7% return for the fiscal year ended June 30. Yale's endowment had \$17.5 billion in assets as of June 30.

Courtesy of a close second was the University of Texas at Austin, which had a 10.1% return for the fiscal year ended June 30. The endowment had \$15.1 billion in assets as of June 30.

**See P&I on page 21**

**Real Estate**

## \$789 billion in debt finally starting to flow to marketplace

It is the moment real estate investors have been waiting for since the beginning of the recession. Real estate debt is finally starting to flow to the marketplace.

Real estate debt is finally starting to flow to the marketplace. Real estate debt is finally starting to flow to the marketplace.

**See P&I on page 21**

**At Deadline**

## N.J. Blackstone partner

New Jersey Division of Investment and Securities has issued a cease-and-desist order to Blackstone's investment adviser, which is the first of its kind.

The order says that Blackstone's investment adviser, which is the first of its kind, has violated the state's securities laws.

**See P&I on page 21**

**Defined Contribution**

## Stable value alternative found

Federal Reserve plan shifts to new ladder bond approach

The Federal Reserve Employee Benefits Division is testing an innovative form of bond portfolio investment called "stable value."

The plan is to test the "stable value" approach with a group of federal employees.

**See P&I on page 21**

**Now on Pensions.com/features**

## How does your governance structure affect your strategy?

Capital structure is a key factor in determining your strategy. How does your governance structure affect your strategy?

**See P&I on page 21**

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# THANK YOU



Pensions & Investments thanks MetLife for their participation in the 2018 Pension Risk Strategies Conference.

If you have any questions regarding your sponsorship package, or would like to discuss future opportunities, please contact your respective sales representative:

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