

# Evolving Fiduciary Obligations of Institutional Investors

FEBRUARY 21, 2017 | TEMPE MISSION PALMS | TEMPE, AZ

## Globalization – And the Role of Active Engagement in It – At a Crossroads

For 8 years now, in conjunction with co-host Kessler Topaz Meltzer & Check LLP, and with the essential input of an Advisory Board of your peers, we will offer a thorough overview of the landscape within which legal advisors are operating to fulfill their obligations as fiduciaries and active shareholders, and in turn, how they may better leverage strategies and objectives within this environment. Emphasizing real-world examples of how shareholders are engaging with the companies they invest in, this one-day event will review the most crucial legal decisions, regulatory actions, and developments investors should be aware of, and offer insights on the approaches successful plans have implemented to create the structures that meet investment return targets strategically and for the long term.



### Keynote Speaker

## Al Gore

*Former Vice President  
of the United States,  
Chairman,  
The Climate Reality Project*

Al Gore was referred to by *Time* magazine as “a businessman who is out to change the world.” An environmental, business, and tech visionary recognized as one of the world’s leading activists, Vice President Al Gore offers a unique perspective on national and international issues, including the threats of climate change and the future of tech.

Consistently an active leader in technology, Al Gore is uniquely in touch with the opportunities and challenges in charting a new digital society. Vice President Gore’s status as a leader in global politics, technology and business influences his positions as member of the Board of Directors of Apple and a Senior Partner at Kleiner Perkins Caufield & Byers, Silicon Valley’s preeminent venture firm. In addition, he is Chairman of Generation Investment Management, an asset-management company incorporating sustainability values into the financial-services world.

### 2017 Advisory Board (to date)

James O’Connor  
*Managing US Counsel*  
Aberdeen Asset Management Inc.

Paul Matson  
*Director*  
Arizona State Retirement System

Brian J. Bartow  
*General Counsel*  
CalSTRS

Lowell Haky  
*Associate General Counsel*  
Charles Schwab

Michael D. Herrera  
*Senior Staff Counsel*  
Los Angeles County Employees Retirement  
Association

Chris Supple  
*Deputy Executive Director and General Counsel*  
Massachusetts Pension Reserves Investment  
Management Board (MassPRIM)

Jennifer J. Peet  
*Director of Legal Affairs*  
Oregon State Treasury

George W. Neville  
*Special Assistant Attorney General*  
State of Mississippi

Registration is COMPLIMENTARY for qualified delegates.

For further information, please contact Ann Cornish +1 (212) 224-3877 or [acornish@iiforums.com](mailto:acornish@iiforums.com)

**KESSLERTOPAZ  
MELTZERCHECK** LLP

Visit [www.iiforums.com/efoi](http://www.iiforums.com/efoi) for more information