The New York Metro Area Chapter invites you to attend…

How Does Your Investment Committee Stack Up?

Please join us as our speaker, Catherine Gordon, Principal within Vanguard Investment Strategy Group discusses the best practices for investment committees as well as advice on how investment committees can adopt these best practices for their committees.

Investment committees have a fiduciary responsibility for making decisions on behalf of the current or future beneficiaries of pools of assets. Just as the markets have been challenging for investors over the past decade, investment committees have been faced with such challenges as regulatory changes, asset allocation choices, and spending decisions.

Speaker:
Catherine D. Gordon
Principal, Vanguard Investment Strategy Group

Catherine D. Gordon, principal, leads the institutional research and advice team within Vanguard Investment Strategy Group. Previously, she led Vanguard Institutional Advisory Services®, where she was responsible for a team of investment professionals that provided asset allocation modeling, investment policy consulting, portfolio construction recommendations, and ongoing investment management to endowment, foundation, and defined benefit clients. In addition to her advisory and research leadership, Ms. Gordon spent several years with Vanguard Portfolio Review, where she helped oversee the investment managers of our mutual funds.

Before joining Vanguard in 1994, Ms. Gordon held positions as a portfolio manager for Wilmington Trust and as an equity research analyst for Morgan Stanley and Peter B. Cannell & Co., Inc., of New York. Ms. Gordon is a member of the CFA Society of Philadelphia and the CFA Institute. She earned a B.A. from Smith College and holds FINRA Series 6, 7, 24, and 63 licenses.

Date: Tuesday, August 13, 2013
Time: Registration check-in begins at 8:30 AM
Presentation / Q & A from 9:00 AM – 10:00 AM

Meeting Location and Directions:
Random House, 1745 Broadway, 14th Floor, L'Amour Room (b/t 55th & 56th St)

<u>Directions</u>
Take the 1, A, or C to Columbus Circle, or
Take the N, Q, or R to 57th St / 7th Ave

NOTE: Photo *ID and pre-registration are required to enter the building!*

Online Registration Form

How Does Your Investment Committee Stack Up?

REGISTER HERE

To attend you must register by **Friday, August 9, 2013 (5 PM)**

Attendees of this event will receive 1.0 CEBS CPE credit

If you will not be able to attend, please notify us no later than 5:00 PM on Friday, August 9, 2013. Non-members not able to attend must notify us by this date to receive a refund.

NY Metro Area Chapter Meeting Costs:

Member – Free
Non-Member – $25 Fee

Payment for non-members of the NY Metro Chapter:

- Via PayPal, you will be taken to the payment page once you register for the event on our website.
- In-person via check-in at the event. When you register, please add a note in the "additional comments" field that you will pay at the event via check. At the registration desk please provide your check made payable to **"New York Metro Area Chapter – ISCEBS".**

Tax ID #: 13-3293220

The NY Metro Chapter of ISCEBS is now accepting online registrations. Please contact Sue Andres if you have any questions or feedback regarding the new registration process:

E-Mail: support@cebsnyc.org
Telephone: (718) 705-4263

For questions about the program, please contact Rich Raia:

E-Mail: education@cebsnyc.org
Telephone: (732) 266-4222

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