

# TVA Investment Challenge Program Conference

## April 2-3, 2024

### LOCATION:

Hilton Nashville Downtown

121 Fourth Avenue South

Nashville, TN 37201

Parking Options: valet for overnight guests (one car per school encouraged is possible)  
valet or self-parking available for day attendees

### DRESS CODE:

Business casual (cardigans, blazers, or sport coats encouraged)

### Tuesday, April 2<sup>nd</sup>

- |                            |   |
|----------------------------|---|
| <b>11:00 am CDT</b>        | <b>CONFERENCE REGISTRATION TABLE OPENS</b> (11:00 am – 5:30 pm CST)   |
| <b>12:30 – 1:15 pm CDT</b> | <b>WELCOME SESSION (STUDENTS AND PROFESSORS)</b><br><i>“TVA Overview and Performance of the ICP over 2 decades”</i>   |
| <b>1:15 – 1:30 pm CDT</b>  | <b>BREAK FOR GROUP PHOTO</b>  |
| <b>1:30 – 3:00 pm CDT</b>  | <b>STUDENT BREAKOUT SESSIONS</b><br>8 breakout rooms hosted by TVA leadership with 2-3 schools each<br>Room 1 – Tom Rice hosts      Room 2 – Rebecca Jones hosts<br>Room 3 – Tammy Wilson hosts      Room 4 – Brian Child hosts<br>Room 5 – Cass Larson hosts      Room 6 – Diane Wear hosts<br>Room 7 – Regional VPs hosts      Room 8 – Lyndsay Sneckenberger hosts |
| <b>3:00 – 3:45 pm CDT</b>  | <b>BREAK</b>  |
| <b>3:45 – 4:50 pm CDT</b>  | <b>STUDENT AND PROFESSOR BREAKOUT SESSION</b><br><i>“Economic Outlook and Portfolio Construction”</i><br>Celia Dallas, Chief Investment Strategist, Cambridge Associates<br>Eric Davis, Director Corporate Investments, TVA   |
| <b>5:00 – 6:00 pm CDT</b>  | <b>PROFESSOR BREAKOUT SESSION</b><br>Portfolio Management   |
| <b>5:00 – 6:00 pm CDT</b>  | <b>STUDENT BREAKOUT SESSION</b><br><i>“Meet the Firms”</i> networking opportunity   |

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Meet the Firms continued.....

### Attendees:

#### **Table 1**

##### Covenant Capital Group

Govan White, Managing Partner  
Dan Barber, CFO

#### **Table 2**

##### Health Velocity Capital

Bruce Crosby, Managing Partner

#### **Table 3**

##### CapitalSpring

James Nevant, Associate  
Dan Villalba, Associate

#### **Table 4**

##### Cambridge Associates

Celia Dallas, Chief Inv Strategist  
Ian Monteith, Sr. Inv Director

#### **Table 5**

##### Parametric Associates

Jason Chalmers, Executive Director  
Heather Wolf, Portfolio Manager

#### **Table 6**

##### Allspring

Scott Eldridge, Portfolio Manager

#### **Table 7**

##### Mackay Shields

Joseph Maietta, Managing Director  
Kirk Kashevaroff, Managing Director

#### **Table 8**

##### TVARS

Michael Barnes, Sr. Analyst

#### **Table 9**

##### TN Consolidated Retirement System

Michael Brakebill, CIO

#### **Table 10**

##### TVA

Bert Robinson, Director East Region; Jared Mitchem, VP South Region  
Mark Yates, VP West Region; Justin Maierhofer, VP North Region  
Ashton Adams, Talent Planning Specialist; Brittany Feisley, Talent Consultant  
Various executive leadership with TVA's Financial Services Organization

**6:30 – 8:30 pm CDT**

#### **DINNER & AWARDS MEETING**

Welcome and opening remarks

Keynote address

Presentation of awards to top performing schools for CY2023

Presentation of service awards

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**Wednesday, April 3<sup>rd</sup>**

- |                                |  |
|--------------------------------|--|
| <b>7:45 am CDT</b>             | <b>REGISTRATION &amp; BREAKFAST OPEN</b>   |
| <b>8:30 – 9:40 am CDT</b>      | <b>INVESTMENT MANAGER PANEL #1</b><br>Panelists:<br>Scott Eldridge, Portfolio Manager, Allspring Global Investments<br>Joseph Maietta, Managing Director, MacKay Shields<br>Heather Wolf, Portfolio Manager, Parametric Associates             |
| <b>9:40 – 9:50 am CDT</b>      | <b>BREAK</b>   |
| <b>9:50 – 11:05 am CDT</b>     | <b>PRESENTATION BY TOP PERFORMING SCHOOLS</b><br>Top three performing schools present their portfolio followed by audience Q&A<br>(listed in no particular order)<br>Tennessee Tech University<br>Lipscomb University<br>University of Memphis |
| <b>11:05 – 11:15 am CDT</b>    | <b>BREAK</b>   |
| <b>11:15 am – 12:30 pm CDT</b> | <b>INVESTMENT MANAGER PANEL #2</b><br>Panelists:<br>Bruce Crosby, Managing Partner, Health Velocity Capital<br>Govan White, Managing Partner, Covenant Capital Group<br>Richard Fitzgerald, Managing Partner, CapitalSpring                    |
| <b>12:30 - 1:00 pm CDT</b>     | <b>LUNCH AND WRAPUP</b>  |