

# TVA Investment Challenge Program Conference

## April 9-10, 2026

### **LOCATION:**

Hilton Nashville Downtown

121 Fourth Avenue South

Nashville, TN 37201

Parking Options: valet for overnight guests (one car per 4 school attendees encouraged if possible)  
valet or self-parking available for day attendees

### **DRESS CODE:**

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

### **Thursday, April 9<sup>th</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> <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>PERFORMANCE BREAKOUT SESSIONS</b>
<b>3:00 – 3:30 pm CDT</b>	<b>BREAK</b>
<b>3:30 – 4:35 pm CDT</b>	<b>STUDENT AND PROFESSOR BREAKOUT SESSION</b> Celia Dallas, Chief Investment Strategist, Cambridge Associates
<b>4:45 – 5:45 pm CDT</b>	<b>PROFESSOR BREAKOUT SESSION</b> Portfolio Management (Attribution, Guidelines, Trading, etc.)
<b>4:45 – 6:15 pm CDT</b>	<b>STUDENT BREAKOUT SESSION</b> Careers in Finance Panel followed by Networking Opportunities with business professionals and other attending universities

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Thursday, April 9<sup>th</sup>

## STUDENT BREAKOUT SESSION CONTINUED...

Attendees:

### Table 1

#### Atlas Holdings

Jacob Hudson, Managing Partner

### Table 2

#### CapitalSpring

Erik Herrmann, Partner

Dan Villalba, Senior Associate

Guy Harper, Vice President

### Table 3

#### 1547 Capital

Bryan Loewen, Founder

### Table 4

#### Cambridge Associates

Celia Dallas, Chief Inv Strategist

Chris Sanchez, Inv Director

### Table 5

#### Cerberus Capital Management

Andrew Solomon, Managing Director

### Table 6

#### City of London

Michael Edmonds, CIO

### Table 7

#### Barksdale Investment Management

Ann Roberts, CEO

Stephen Zurlo, Associate PM

Melissa Laffer, Equities PM

### Table 8

#### Parametric

Jason Chalmers, Director CRM

Alex Zweber, Managing Director

### Table 9

#### PIMCO

Eric Bachman, Senior VP

Caroline Mitchell, Associate

Catharine Roddy, VP

### Table 10

#### Covenant Capital

Dan Barber, Managing Partner

### Table 11

#### TVARs

Zack Wallace, Specialist

### Table 12

#### TVA

Eric Allen, Sr. Program Mgr Investments  
Kim Lubienski, Sr. Program Mgr Treasury  
Addison Towns, Specialist Investor Relations  
Brantley Baker, Billing Specialist

### Table 13

#### Tennessee Consolidated Retirement System

Andrew Campbell, Investment Analyst

Chris Denny, Portfolio Manager

Joel Charalambakis, Portfolio Manager

Markus Klar, Director of Fixed Income

Daniel Crews, Deputy CIO

Carrie Green, Director of Equities

Elliott Brewer, Associate Portfolio Manager

Jonah Mikulski, Real Estate Analyst

### Table 14

#### Fidelity

Caleigh Herring, Financial Consultant

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## Thursday, April 9<sup>th</sup>

6:30 – 8:00 pm CDT

### **DINNER & AWARDS CEREMONY**

Welcome and opening remarks

TVA Leadership Panel

Presentation of awards to top performing schools for CY2025

Presentation of service awards

## Friday, April 10<sup>th</sup>

7:45 am CDT

### **REGISTRATION & BREAKFAST OPEN**

8:30 – 9:40 am CDT

### **INVESTMENT MANAGER PANEL #1**

Panelists:

City of London

Parametric Portfolio Associates

PIMCO

9:40 – 9:50 am CDT

### **BREAK**

9:50 – 11:05 am CDT

### **PRESENTATION BY TOP PERFORMING SCHOOLS**

Top three performing schools present their portfolio followed by audience Q&A  
(listed in no particular order)

Union University

Kentucky University

Belmont University

11:05 – 11:15 am CDT

### **BREAK**

11:15 am – 12:30 pm CDT

### **INVESTMENT MANAGER PANEL #2**

Panelists:

Atlas Holdings

Cerberus Capital Management

1547 Critical Systems Realty

12:30 - 1:00 pm CDT

### **LUNCH AND WRAPUP**