2017 Outlook

Thursday, February 23, 2017

MODERATOR:

Eileen Neill

At Wilshire Associates, Eileen Neill is a consulting team leader and is responsible for providing investment consulting services to institutional plan sponsors including public pension funds, private pension plans, endowment/foundations, and insurance companies. These services include asset/liability studies, investment policy development and implementation, manager evaluation, selection and monitoring, performance measurement and evaluation, asset class and investment strategy research, plan sponsor education, and custom projects. Eileen has been a consulting team leader at Wilshire for over fifteen years and has worked predominantly with large public pension funds with assets ranging from $5 to $150 billion in the development and implementation of their respective investment programs. In addition to defined benefit plan consulting, Eileen also engages in consulting to defined contribution plans, healthcare operating funds, and taxable clients. Ms. Neill's background at Wilshire includes asset class and capital market research which resulted in white papers as well as dozens of asset/liability studies for both tax-exempt and taxable investors. Additionally, she has spoken at many conferences on a variety of subjects including derivatives investing, strategy implementation, and performance-based fees.

Eileen received a B.S. in Marketing Research from the University of Arizona and an M.B.A. in Finance from Chapman University. She holds a Chartered Financial Analyst designation and is a member of the Los Angeles Society of Financial Analysts.

PANELISTS:

Anne Mathias

Ms. Mathias is a Senior Managing Director and Guggenheim Investments' Senior Macro Strategist. Building on her 20 years of experience in global investment strategy, she works closely with the firm's Global Chief Investment Officer to formulate and communicate Guggenheim's macro view to institutional clients, financial advisors, and internal constituents and to support the firm as a leader in capital markets & economic insight. She speaks regularly to investors and the media, appearing on Bloomberg TV, CNBC, CNN and others.

With support from a team of economists, strategists and analysts, she is also a key resource in translating the high-level views of the firm for Guggenheim's Portfolio Managers and investment staff. Prior to this role, she was the Head of Research for Guggenheim Investments and before that, the Director of Research for Guggenheim Securities' Washington Research Group, which provides political, economic, and industry research for investors and has been consistently ranked top three in the Institutional Investor "All America Research Team" Poll.

Earlier in her career, Ms. Mathias was a General Partner in healthcare and biotech private equity funds investing in the United States and internationally, and spent five years as a senior consultant specializing in privatization and enterprise restructuring in the emerging markets with Deloitte & Touche.

Ms. Mathias has a B.A. (cum laude, Phi Beta Kappa) from the University of Maryland, and a Master's in International Affairs, with honors, from Georgetown University. She is a CFA Charter holder and a member of the CFA Society of Los Angeles and the CFA Institute.

Tiffany Wilding

Ms. Wilding is a senior vice president and U.S. economist based in the Newport Beach office. Prior to joining PIMCO in 2016, she was director of global interest rate research at Tudor Investment, responsible for recommending trade ideas based on global macro trends. Previously, she was a vice president for U.S. interest rate research with Morgan Stanley and a Treasury market policy analyst for the Federal Reserve Bank of New York. She has eight years of investment and economics/financial markets experience and holds an MBA from New York University's Stern School of Business. She received an undergraduate degree from Rhodes College.

Jim Williams

James Williams has been the vice president and chief investment officer of the Trust since December 2002 and was appointed treasurer in May 2006. Before joining the Getty, Williams spent three years as the president of Harbor Capital Advisors and president of the Harbor Fund's family of mutual funds. Prior to that, he was manager of the pension asset management department of Ford Motor Company. Williams holds a B.S. in engineering from the University of Michigan and an M.B.A. in finance from the University of Chicago.