

CIOs On The Move - 2016

Institution	AUM (Millions)	Firm Type	City	State	Date	Comments
<u>Foundations & Endowments</u>						
Dartmouth College*	\$ 4,500	Endowment	Boston	MA	Jun-17	Pamela Peedin will step down as Dartmouth's CIO June '17 after 6 years for family reasons. A search for Dartmouth's next CIO is underway.
Broad Foundations	\$ 2,500	Foundation	Los Angeles	CA	Dec-16	Katharine "KC" Krieger was named CIO to oversee Broad Foundation portfolios, including The Eli and Edythe Broad Foundation and Broad Art Foundation. Ms. Krieger has been affiliated with the Foundations since 2001. She succeeds Marc Schwartz, who left after more than 6 years as CIO of the Foundations.
Denison University*	\$ 800	Endowment	Granville	OH	Dec-16	Adele Gorrilla is leaving Denison's investment office after 8 years to join a Philadelphia-based family office. No interim CIO has been named while the endowment searches for a replacement.
Columbia University	\$ 9,200	Endowment	New York	NY	Dec-16	Columbia Investment Management Company promoted Managing Director Tim Donohue to CIO, replacing Peter Holland, who became the endowment's CEO after Narv Narvekar left to head Harvard Management. Mr. Donohue first joined the endowment in 2008.
Texas A&M Foundation	\$ 1,400	Endowment	College Station	TX	Dec-16	Janet Handley retired as CIO after 15 years at Texas A&M Foundation. Ben Wall, who joined the Foundation in '08 and had most recently served as Alternative Investments Director was named the new CIO.
Washington University*	\$ 7,500	Endowment	St. Louis	MO	Dec-16	Kim Walker stepped down as CIO of Washington University after 10 years. Eric Upin, a board member of WUIMC, will serve as interim CIO while leading the search for Ms. Walker's permanent successor.
Carleton College*	\$ 500	Foundation	Minneapolis	MN	Nov-16	Jason Matz left Carlton College after almost 13 years as CIO. Mr. Matz was hired as the endowment's first CIO. Andy Christensen, Director of Private Markets was named Interim CIO.
Conrad N. Hilton Foundation	\$ 5,600	Foundation	Agoura Hills	CA	Nov-16	CIO, Randy Kim left Hilton Foundation March '16 after 8 years for personal reasons. Michael Buchman & Yatin Patel replaced him as Co-CIOs at the Foundation.
James Irvine Foundation	\$ 2,000	Foundation	San Francisco	CA	Nov-16	Tim Recker, formerly Managing Director for PE & Real Assets at UC Regents, was named CIO of James Irvine Foundation. He replaced John Jenks who retired as CIO after 14 years with the Foundation.

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University of Texas Investment Management Company (UTIMCO)*	\$ 37,000	Endowment	Austin	TX	Oct-16	Mark Warner was named interim CEO & CIO of UTIMCO following the departure of Bruce Zimmerman, who had been with UTIMCO for 9 years. UTIMCO launched a national search for Mr. Zimmerman's successor.
Southern Methodist University	\$ 1,500	Endowment	Dallas	TX	Sep-16	Rakesh Dahiya, formerly Director of Marketable Strategies at the University of Florida, was named Treasurer & CIO at SMU. He replaced interim CIO Christine Regis, following former CIO Michael Condon's departure after 8 years in Mar '16 to Fund Evaluation Group where he joined as Senior VP & OCIO.
Stony Brook University	\$ 450	Foundation	Stony Brook	NY	Sep-16	David Marcus, formerly of SHL Capital, was named CIO at Stony Brook Foundation, succeeding inaugural CIO Erin Abouzaid, who left after 4 years to join Hitchin Hill Capital.
Cystic Fibrosis Foundation	\$ 3,700	Foundation	Bethesda	MD	Aug-16	Jack Mahler became the Cystic Fibrosis Foundation's first CIO. Mr. Mahler was formerly Senior Managing Director & Executive VP at Ontario's Public Employee Retirement System (OMERS).
National Fish & Wildlife Foundation (NFWF)	\$ 400	Foundation	Washington	DC	Aug-16	Kenneth Stemme became inaugural Director of Investments at the National Fish & Wildlife Foundation. Mr. Stemme was formerly a Senior Investment Officer at IMF.
Cornell University	\$ 6,000	Endowment	Ithaca	NY	Jul-16	Kenneth Miranda, formerly Director of the IMF's Investment Office, was named Cornell's CIO. He replaced AJ Edwards who resigned April '16.
Johns Hopkins University*	\$ 3,400	Endowment	Baltimore	MD	Jun-16	Kathryn Crecelius retired from Johns Hopkins after 11 years as CIO. A search is on-going for her successor.
Lehigh University	\$ 1,200	Endowment	Bethlehem	PA	May-16	Kristen Agatone joined Lehigh as CIO. Ms. Agatone was formerly Managing Director at Summit Rock Advisors and Vice President at Harvard Management Company. Peter Gilbert retired Oct '15 after 8 years as CIO.

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Arizona Community Foundation	\$ 800	Foundation	Phoenix	AZ	Mar-16	Gary Dokes left Arizona State Retirement System (ASRS) after 20 years to become the inaugural CIO at the Arizona Community Foundation.
Carnegie Institution of Science	\$ 1,000	Endowment	Washington	DC	Mar-16	Michael Stambaugh left the Alfred P. Sloan Foundation after 2 years to become the first CIO at the Carnegie Institute of Science.
Trinity Church Wall Street	\$ 1,800	Endowment	New York	NY	Mar-16	Meredith Jenkins, formerly VP & Co-CIO of Carnegie Corporation, was appointed to the newly created position of CIO. Kim Lew, formerly VP & Co-CIO at Carnegie, became sole CIO.
Carnegie Corporation	\$ 3,200	Foundation	New York	NY	Mar-16	Kim Lew, formerly Co-CIO of Carnegie Corporation assumed the role of CIO after Meredith Jenkins, formerly Co-CIO was appointed to the newly created position of CIO at Trinity Church Wall Street.
Pension Funds						
Colorado Public Employees Retirement (COPERA)*	\$ 44,000	Public Pension Fund	Denver	CO	Mar-17	Jennifer Paquette will retire in the first quarter of 2017. She has been with COPERA for almost 20 years, 13 as CIO. The fund will use a search firm to manage the replacement process.
Pennsylvania Treasury Department*	\$ 20,000	Public Pension Fund	Harrisburg	PA	Dec-16	Sandy Leopold, previous CIO of Pennsylvania Treasury, retired Dec '16. Penn Treasury hopes to find a replacement by Feb '17.
Louisiana School Employees Retirement System (LSERS)	\$ 1,800	Public Pension Fund	Baton Rouge	LA	Dec-16	Matthew Freedman was named CIO of LSERS. He replaced Christopher Saik, who left the pension Nov '16 to become the first CIO at the Louisiana Municipal Employees' Retirement System. Mr. Freedman was previously an investment analyst at Landseer Advisors.
Orange County Employees Retirement System (OCERS)*	\$ 13,000	Public Pension Fund	Orange County	CA	Dec-16	Girard Miller resigned as CIO after 4 years with OCERS. Director of Investment Operations Shanta Chary and consultants Meketa Investment Group and Pension Consulting Alliance will fulfill the duties of interim CIO.
Illinois State Universities Retirement System (SURS)	\$ 17,000	Public Pension Fund	Champaign	IL	Nov-16	Douglas Wesley was named interim CIO of SURS, taking over for Daniel Allen, who was on family leave and scheduled to retire Aug '17. Mr. Wesley has been with SURS since '05 and was previously Deputy CIO.

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Louisiana Municipal Employees' Retirement System (MERSLA)	\$ 800	Public Pension Fund	Baton Rouge	LA	Nov-16	Christopher Saik joined MERSLA as its first CIO. He was previously CIO of the Louisiana School Employees' Retirement System (LSERS) for 2 years.
Sacramento County Employees' Retirement System (SCERS)	\$ 8,000	Public Pension Fund	Sacramento	CA	Oct-16	Steve Davis was promoted to CIO after 6 years with the pension, the latter 4 as Deputy CIO. He replaced Scott Chan, who left in Jan '15 to become Senior Managing Director of Public Equities at UC Regents' investment office.
Ernst & Young	\$ 14,000	Corporate Pension Fund	Secaucus	NJ	Oct-16	Walter Kress was named CIO & Treasurer for E&Y's pension funds, replacing Kym Hubbard, who retired earlier this year after over 8 years as CIO. Mr. Kress was previously a managing director with J.P. Morgan Chase's retirement plans.
Ford Motor Company	\$ 42,000	Corporate Pension Fund	Ann Arbor	MI	Oct-16	Erin Rohde was appointed Ford's new investment chief, replacing Kathleen Gallagher who retired after 35 years. Ms. Rohde had been with Ford since 2000, serving in various treasury & investment roles.
International Monetary Fund (IMF)	\$ 11,500	Corporate Pension Fund	Washington	DC	Oct-16	Derek Bills was appointed Director of the Investment Office after the departure of Kenneth Miranda who was previously in the role for 16 years. Mr. Bills had worked in the investment office for 18 years in various capacities, including Chief Operations Officer.
South Carolina Retirement System (SCPEBA)	\$ 29,000	Public Pension Fund	Columbia	SC	Sep-16	Geoffrey Berg was named CIO of SCPEBA. He had been with the pension over 7 years and served as acting CIO since Nov '15 when Hershel Harper resigned after 4 years to become CIO of UAW Retiree Medical Benefits Trust.
DTE Energy	\$ 9,000	Corporate Pension Fund	Houston	TX	Sep-16	DTE Energy appointed alternatives specialist Angela Buk as its new investment chief. Ms. Buk, who most recently led the alternative investments team at Fiat Chrysler Automobiles (FCA), replaced ex-CIO of 9 years Paul Cavazos, who was named CIO of American Beacon Funds June '16.

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Fairfax County Retirement System*	\$ 6,700	Public Pension Fund	Fairfax	VA	Jul-16	CIO Gregory Samay left Fairfax Country Retirement System after 3 years. A new CIO has yet to be named.
Employees' Retirement System of Rhode Island (ERSRI)	\$ 8,300	Public Pension Fund	Warwick	RI	Jul-16	Tim Nguyen was named interim CIO of ERSRI when Anne-Marie Fink left to join Matheys Lane Capital after 4 years as CIO. Mr. Nguyen was formerly Director of Investments at University of Connecticut Foundation.
Indiana Public Retirement System (INPRS)	\$ 30,000	Public Pension Fund	Indianapolis	IN	Jun-16	Scott Davis was named interim CIO of INPRS when David Cooper left after almost 9 years to become CIO of Purdue Research Foundation Oct '15.
Missouri State Employees' Retirement System (MOSERS)	\$ 8,000	Public Pension Fund	Jefferson City	MO	Jun-16	Rick Dahl retired as CIO after 21 years at MOSERS. Deputy CIO Seth Kelly, who has been with MOSERS since '05, took over as CIO.
City of Philadelphia Board of Pensions & Retirement	\$ 5,000	Public Pension Fund	Philadelphia	PA	Jun-16	Bernard Buckley, Deputy CIO, joined the pension May '16. There has been no new CIO since Michael Donatucci's death July '16. Mr. Donatucci was hired following the departure of Brad Woolworth April '16 to join NY State Teachers' Retirement System as Manager of PE.
Pennsylvania State Employees Retirement System (PSERS)	\$ 26,000	Public Pension Fund	Harrisburg	PA	Jun-16	Bryan Lewis was named CIO of PSERS. He took over from Thomas Brier, who retired after 16 years with the pension. Mr. Lewis was previously Executive Director at Illinois State Universities Retirement System.
IBM Retirement Funds	\$ 150,000	Corporate Pension Fund	White Plains	NY	Jun-16	Ray Kanner, CIO & Managing Director, announced his retirement after 38 years at IBM. William Grey, former Chief Investment Strategist, was named CIO. Mr. Grey has been with IBM since 1990.
Alaska Permanent Fund Corp (APFC)	\$ 52,000	Public Pension Fund	Juneau	AK	May-16	Russell Read joined APFC as CIO. He replaced Jay Willoughby who joined TIFF Oct '16. Mr. Read was formerly CEO & CIO of Gulf Investment Corp.

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Shoreline Investment Management	\$ 30,000	Corporate Pension Fund	Palo Alto	CA	May-16	CIO Gretchen Tai left HP's corporate pension office after 13 years. Canyon Chan, former Deputy CIO, took over as CIO. Mr. Chan joined HP in Sep '14 after 23 years at Franklin Templeton.
City of Austin Employees' Retirement System (COAERS)	\$ 2,200	Public Pension Fund	Austin	TX	Apr-16	David Veal replaced Kirk Stebbins as CIO of COAERS who left after 7 years in Oct '15 to become Oklahoma Teachers' Retirement System's first CIO. Mr. Veal was previously CIO at EF Capital Management, Director at Texas Teacher Retirement System and Portfolio Manager at Texas Employees Retirement System.
Policemen's Annuity & Benefit Fund of Chicago	\$ 2,400	Public Pension Fund	Chicago	IL	Apr-16	Aoifinn Devitt was named CIO of the Fund. Ms. Devitt was previously head of Nikko Asset Management's hedge fund subadvisor platform. Ms. Devitt replaces Samuel Kunz, previous CIO of 7 years, who became Managing Director at the UC Regents' investment office.
New York State Nurses Association (NYSNA)	\$ 2,900	Public Pension Fund	New York	NY	Apr-16	Case Fell was named CIO of NYSNA, replacing Russ Niemie who left March 16' after 16 years as CIO. Mr. Fell has been with the NYSNA since '08, previously as Director of Research.
Johnson & Johnson	\$ 22,000	Corporate Pension Fund	New Brunswick	NJ	Apr-16	Neil Roache joined Johnson & Johnson as CIO replacing Bill Rauh who retired after 28 years with the firm. Mr. Roache was formerly Director of Investment Strategy & Public Markets at Exelon.
Arizona State Retirement System (ASRS)	\$ 34,000	Public Pension Fund	Phoenix	AZ	Mar-16	Karl Polen, previously head of Private Markets Investing, was promoted to CIO following the departure of Gary Dokes. Mr. Dokes left after a two-decade tenure to serve as the inaugural investment chief of the Arizona Community Foundation.
National Railroad Investment Trust	\$ 25,000	Union Pension Fund	Washington	DC	Feb-16	William Carr III was named CIO, replacing Catherine Lynch who joined the trust in 2003 and became CEO/CIO in 2008. Mr. Carr joined the trust in 2010 as Director of U.S. Equity.
Dow Chemical	\$ 14,000	Corporate Pension Fund	Midland	MI	Jan-16	Rob Sparling was promoted to CIO of Dow Chemical after 20 years with the company. He replaced Gary McGuire, who after 9 years as CIO was named Vice President & Treasurer of Dow.

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Other Institutional Investors						
Fund Evaluation Group (FEG)	\$ 3,600	Outsourced CIO	Cincinnati	OH	Aug-16	Michael Condon was appointed OCIO Senior Vice President at FEG, a newly created position. Mr. Condon was formerly CIO at Southern Methodist University for 7 years.
New York Presbyterian Hospital	\$ 7,000	Hospital/ Healthcare Organization	New York	NY	Jun-16	William Lee, formerly CIO & VP of foundation and pension investments for Kaiser Permanente was named CIO of NY Presbyterian. He replaced Gloria Reeg, who retired after 9 years.
Wilshire Associates	\$ 7,000	Outsourced CIO	Pittsburgh	PA	Apr-16	Mark Brubaker was named CIO of Wilshire's OCIO business. He was previously a managing director at Wilshire Associates for 20 years.
Baylor Scott & White Health	\$ 5,700	Hospital/ Healthcare Organization	Dallas	TX	Apr-16	Mark Amiri, formerly CIO at Baylor Scott & White, left after 8 years to become Associate Vice Chancellor for Finance & Treasurer at Washington University. Chief Debt Officer Frank Anderson took on the additional role of CIO.
Commonfund	\$ 25,200	Outsourced CIO	Wilton	CT	Jan-16	Mark Anson was appointed CIO of Commonfund. He was CIO of the Robert Bass Family Office for 3 years prior, and previously served as CIO of the CalPERS & British Telecom Pension Scheme as well as President of Nuveen Investments.

*Indicates CIO position has not yet been filled and search is on-going

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