



# Are Today's Challenging Markets Presenting Long-Term Investment Opportunities?

Wednesday, October 1st  
The Carolina Inn, Chapel Hill, North Carolina

**2008**

*Featured Facilitators:*  
Janet Cowell, Candidate for North Carolina State Treasurer  
Richard Moore, North Carolina State Treasurer  
Mark Yusko, President and CIO, Morgan Creek Capital Management

**NC Investment  
Roundtable**

# NC Investment Roundtable

## **Are Today's Challenging Markets Presenting Long-Term Investment Opportunities?**

Wednesday, October 1<sup>st</sup>, 2008

8:00 am – 10:30 am

The Carolina Inn, Chapel Hill, North Carolina

211 Pittsboro Street

Chapel Hill, NC 27516

[www.carolinainn.com](http://www.carolinainn.com)

### ***Informal Discussion Topics:***

Members from leading investment firms will discuss and debate the current market environment and where to allocate capital in these challenging markets. The facilitators and panelists will speak to the investment needs of a long-term plan and their views on strategic allocations and tactical changes to enhance returns. At the beginning of the meeting the facilitators will ask if there are specific topics that you would like to be addressed over breakfast.

### ***Some Topic Suggestions:***

- How should the overall portfolio be allocated to achieve long term goals?
- Is now the time to buy financials? Where will real estate investments in the United States go from here?
- Is holding cash a defensive option?
- Where are energy and natural resource equities and investments going to be five years from now?
- Are the best investment opportunities overseas? How do you quantify geopolitical risks?
- What is the role of private equity in the overall portfolio? Will it reduce the volatility and enhance returns?
- What is the best way to access private investments outside of the United States?

### ***Featured Facilitators:***

Sen. Janet Cowell, Candidate for North Carolina State Treasurer

Richard H. Moore, North Carolina State Treasurer

Mark W. Yusko, President and Chief Investment Officer, Morgan Creek Capital Management, LLC

### ***Featured Manager Panelists:***

Zaid Abdul-Aleem, Piedmont Investment Partners

Maurice Coleman, Cherokee Investment Advisors

Pete Falco, Rockwood Capital

Tom Fuller, Angelo Gordon & Co.

Tom Smith, Smith *Defieux* Capital Partners