



Annual Investment Forum

The San Francisco Foundation's 2008 Investment Forum

David Friedman, Chair, Board of Trustees,
Stephanie DiMarco, Chair, Investment Committee,
Sandra R. Hernández, M.D., Chief Executive Officer, and
Monica Pressley, Chief Financial Officer,

Cordially invite you to attend our Annual Investment Forum

The evening will feature presentations by:

Bimal Patel, *Director of Columbia Management*

The Last Monoline: The U.S. Balance Sheet — Implications of the Current Crisis for U.S. Finances and the Potential Impact on the Capital Markets

At Columbia Management in San Francisco, Mr. Patel specializes in derivatives and distressed investments. Prior to joining Columbia, he was the Head of Quantitative Portfolio Management for the Private Bank at Bank of America. At Bank of America Securities, Mr. Patel co-founded and co-developed the first customizable hedge fund of funds. He received his B.A. from Oxford University, and M.A., M. Phil., and Ph.D. from Columbia University in New York, NY.

Michael Miller, CFA, *Managing Director of Colonial Consulting, LLC*

Current Investment Trends and the Foundation's Latest Strategy for Investment

Colonial Consulting, LLC, has been the Foundation's investment consultant since March 2000. Founded in 1980, the firm specializes in providing investment consulting services to endowment, foundation, and not-for-profit organizations. As of June 30, 2008, Colonial had 30 employees, including 20 investment professionals, and a client base of 91 clients with assets in excess of \$23 billion.

Refreshments and hors d'oeuvres will be served

Please RSVP to Courtney King at 415.733.8571 or crk@sff.org

WHAT:

The San Francisco Foundation's Annual Investment Forum

WHEN:

Thursday,
November 6, 2008
5:30 p.m. to 7:30 p.m.

Refreshments and hors d'oeuvres

Guests welcome

WHERE:

The San Francisco Foundation
225 Bush Street,
5th Floor
San Francisco, CA 94104

RSVP:

Courtney King at
415.733.8571 or
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THE SAN FRANCISCO FOUNDATION

The Community Foundation of the Bay Area

www.sff.org