

Adam J. Smith, CFA, CAIA

Speaker Qualifications



Adam J. Smith,
CFA, CAIA

Investment Strategist

Lancaster Pollard
Investment Advisory Group

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Biography

Adam J. Smith, CFA, CAIA, is the investment strategist for Lancaster Pollard Investment Advisory Group, an independent, SEC-registered investment advisor specializing in investment advisory and investment management services to health care and long-term care institutions, foundations, endowments, and other nonprofit organizations. His institutional investment experience is focused on manager research, asset allocation, and portfolio structure. Mr. Smith has been a frequent speaker at Investment Management Institute conferences and is a former member of the Editorial Advisory Board for the Institutional Real Estate Letter.

Areas of Expertise

- Asset Allocation
- Manager Due Diligence
- Portfolio Construction
- Alternative Investments
- Investment strategies for universities, museums, health care providers, community foundations and other nonprofits
- Benchmarking for nonprofits
- Cross-balance-sheet risk analysis (liability-driven investing)

Examples of Available Education Topics

- “Asset Allocation in the Context of Cross-Balance-Sheet Risk”
- “Why Nonprofits Fail”
- “The Goldilocks Liquidity Question: Drought vs. Drowning”

Presentations & Publications

Title	Audience/Publications
An Asset Allocation Process for a Liability-Sensitive World	Healthcare Financial Management Assoc. (HFMA) of W. Pa.
Preserving & Growing Existing Assets	HFMA New Jersey
How to Grow Endowments in the ‘New Normal’	Assoc. of Business Administrators of Christian Colleges
Comparing Active Versus Passive Management	The Nonprofit Minute
ESP for Asset Allocation: Efficient, Strategic, Purposeful	The Nonprofit Minute