APFI breakfast
07:00 - 07:45
Breakfast briefing

Participants
Participant: Laurent Auchlin - Managing Partner, Anglo-Swiss Advisors
Participant: Jauri Häkkä - Managing Director, Widhaby Advisors
Participant: Fernand Schoppig - President, FS Associates
Participant: Navaneeth Krishnan - AVP, Investment Analysis, Envestnet

Registration and coffee
07:45 - 08:15

Welcome
08:15 - 08:30
IM|Power Keynotes

Participants
Presenter: Jenny Adams - Global Executive Producer, IM|Power

Building an industry relevant for the post Covid-19 world: Urgent new solutions to address long-term savings, inclusion and the customer’s financial wellbeing
08:30 - 08:40
IM|Power Keynotes

Participants
Speaker: Alex Birkin - Partner, EMEIA Industry Leader and Global Advisory Leader - Wealth and Asset Management, EY

Is Covid-19 the global trigger needed to catapult us into a truly digital era? What more can we do to help our clients and increase the democratisation and scope of wealth management
08:40 - 09:10
IM|Power Keynotes

Participants
Moderator: Edward Glyn - Managing Director, Head of Global Markets, Calastone
Panelist: Robert Fairbairn - Vice Chairman, BlackRock
Panelist: Gail Weiss - President and Chief Trust Officer, Aon Trust
Panelist: Frédéric Janbon - CEO, BNP PARIBAS Asset Management

How can we harness the new accelerated digitisation for long-term growth and partnerships? Better decision making around transforming portfolio management, trading, compliance and operations
09:10 - 09:40
IM|Power Keynotes

Participants
Moderator: Daron Pearce - CEO, BNY Mellon EMEA Asset Servicing
Panelist: Daniel Andemeskel - Director - Head of Innovation Management, Universal Investment
Panelist: Dean Brown - EY UK Wealth and Asset Management Advisory Partner, EY

Digital innovation from the Asia perspective
09:40 - 09:50
IM|Power Keynotes

Participants
Presenter: Jonathan Larsen - Chief Innovation Officer, Ping An Group

Fast-tracking innovation in technology platforms to deliver personalised investment products and services catering for customers’ overall financial wellness: towards a new vision of open finance and digital identity
09:50 - 10:20
IM|Power Keynotes

Participants
Speaker: Joe Saliba - Deputy Chief Executive Officer, CACEIS
Panelist: Jonathan Larsen - Chief Innovation Officer, Ping An Group

Morning break
10:20 - 11:05
FundForum Plenary

Comparing global CEO strategy as tectonic plates shift across society and global economy - how are different parts of the investment ecosystem responding to the challenges?
11:05 - 11:45
FundForum Plenary

Participants
Panelist: Gary Baker - Managing Director, EMEA, CFA Institute

How the biggest buyers from the global financial institutions are rethinking strategic partnerships with asset managers in the light of global macro shifts
11:45 - 12:15
FundForum Plenary

Participants
Panelist: Jeffrey Bloom - Senior Relationship Manager, UBS Global Wealth Management
Moderator: Jenny Adams - Global Executive Producer, IM|Power
Panelist: Lane Penevost - Global Head of Investments, HSBC Retail Banking and Wealth Management

Who and what is shaking up the fund industry
12:15 - 12:35
FundForum Plenary

Participants
Presenter: Neil Ward - CEO, KNEIP

CEO insight – recalibrating the business and investment model to the macro challenges and opportunities of the global economic reset
12:35 - 13:00
FundForum Plenary

Participants
Panelist: Seema Shah - Chief Strategist, Principal Global Investors (Europe)
Panelist: Stuart Parker - President & CEO, PGIM Investments
Moderator: Rochelle Antoniewicz - Senior Director of Industry & Financial Analysis, Investment Company Institute
Panelist: Martijn Rozemuller - CEO, Europe, VanEck

Networking lunch and hosted discussion roundtables
13:00 - 14:15
FundForum Plenary

Opening remarks
14:15 - 14:20
Distribution

Opening remarks
14:15 - 14:20
Operations, risk and compliance
Opening remarks
14:15 - 14:20
Investment

What does the new age client experience look like in practice?
14:20 - 15:00
Distribution

• The client experience defined
• Commoditisation versus specialisation
• Who, what, why and where - the future role of the client

Participants
Moderator: Rob Sanders - Co-Founder, Door
Panellist: Furio Pietribiasi - Managing Director, Mediolanum Asset Management Ltd.
Panellist: Martin Gilbert - Chairman, Revolut, Aberdeen Standard Investments
Panellist: Lane Prenevost - Global Head of Investments, HSBC Retail Banking and Wealth Management
Panellist: Ben Waterhouse - Head of Savings, Investments and Wealth Management Distribution, Barclays
Panellist: Jenny Johnson - President & CEO, Franklin Templeton

Panel discussion: Recalculating back office processes
14:20 - 15:00
Operations, risk and compliance

• Driving forward change and why it’s crucial
• A look at the latest solutions for asset managers
• Oversight - what needs to be done to ensure effective distribution of funds

Participants
Panellist: Paul Kilcullen - Head of Custody & Funds Services Ireland, Citi
Panellist: Katarina Carlin - COO, Nordkinn Asset Management

Power hour
14:20 - 15:25
Investment

A series of fast-paced presentations from asset managers pitching the rationale behind their fund. Fund buyers will judge the presentations and there will be a live audience vote.

Participants
Judge: Adam Jordan - Director of Investment Research & Management, Paul R. Ried Financial Group
Presenter: Sonia Fasolo - Head of SRI/ SRI Fund Manager, La Financiere de l’Echiquier (LFDE)
Judge: Stéphane Monier - Group Managing Director, Chief Investment Officer, Banque Lombard Odier & Cie SA
Moderator: Ben Granje - Managing Director, Beconomics
Judge: Anders Karsbaek Bertramsen - Head of External Products, Nordea Asset Management

New models of engagement part 2
15:00 - 15:30
Distribution

• The story so far, reviewing what worked pre-crisis and now
• The sectors that are doing well
• Meeting the expectations of the future client

Data, tech and digitalisation: transforming operations
15:00 - 15:30
Operations, risk and compliance

Reserved

Panel discussion: What is the ideal strategic asset allocation?
15:25 - 16:15
Investment

• How you do judicious risk taking
• Focus on type of assets - multi assets or fixed income
• Expected returns, risk and profile of different asset classes

Participants
Moderator: Dr Oliver Roll - Founding Partner, 4AlphaDrivers
Participant: Michael Dittrich - MD, Deutschen Bundesstiftung Umwelt (DBU)
Participant: Maria Leitzbach - Head of Portfolio Management, SOKA BAU
Participant: Ulrich Voss - Executive Board Member, Tresono Family Office AG
Participant: Tina Hecking - Senior Portfolio Manager, Private Banking, Hamburger Sparkasse AG

A new era – data and the changing distribution model
15:30 - 16:15
Distribution

Participants
Presenter: Stephan Pouyat - Global Head of Capital Markets, and Funds and ETF Services, Euroclear

Conversation: How are asset managers increasing their productivity – views from outside the industry
15:30 - 16:15
Operations, risk and compliance

Participants
Participant: Olivier Debeugny - Group CEO, Lingua Custodia
Participant: Arnaud Misset - Chief Digital Officer, Caceis
Participant: Venetia Bell - Head of Strategy, Gulf International Bank (UK)

Afternoon tea
16:15 - 16:45
Presentation: Exploring the role of sub advice in distribution models
16:45 - 17:15
Distribution
- Clarifying the potential pitfalls and opportunities in the sub advisory partnership model

Participants
Moderator: Ric van Weelden - Senior Partner, INDEFI
Speaker: Stéphane Corsaletti - Vice Chairman, ABN Amro Investment Solutions
Speaker: Paolo Biamino - Director, Head of Fund Selection, Euromobiliare A.M.
Speaker: Guillaume Poli - CEO, Edmond de Rothschild Asset Management (Suisse)

Conversation: Middle and back office outsourcing in asset management firms
16:45 - 17:15
Operations, risk and compliance
- Gaining efficiencies by outsourcing reporting tasks, compliance duties and more
- Under the magnifying glass - experiences of outsourcing partnerships
- How to maximise value and minimise risk - is insourcing the answer?

Participants
Participant: Karen Zachary - COO, CRUX Asset Management
Participant: Barbara McKenzie - Senior Executive Director - Investments, Principal Global Investors
Participant: Gerard Walsh - Head of Business Development, Institutional Equities, Northern Trust Corporation
Participant: Leonora Xhekaj - Vice President, Head of Operational Risk Management, Voya Investment Management
Participant: Fiona Horsewill - Head of Product Development and Strategy, EMEA, Citi
Participant: Viktor Fischer - Group Executive Board Member, ACOLIN

Panel discussion: The delegated investment solutions showdown
17:15 - 17:50
Distribution
- Comparing delegated investment solutions: sub-advised funds, funds-of-funds and discretionary model portfolios
- What are the use cases of each for distributors?

Participants
Moderator: Andreas Pfunder - Founder and CEO, instiHub Analytics
Panelist: Alberto Herranz - Investment Research & Risk Analysis, Allfunds
Panelist: Martin Fenner - Head Global Investment Marketing & Business Solutions, J. Safra Sarasin
Panelist: Mussie Kidane - Head of Fund Selection, Pictet
Panelist: Justin Onuekwusi - Fund Manager, Head of Retail Multi-Asset Funds, Legal & General Investment Management

Presentation: Drive towards personalisation - how to serve your clients better
17:15 - 17:45
Operations, risk and compliance
- How to improve customer service and boost future revenues
- Case studies from asset managers – before and after
- Lessons learned and what the future holds

How disruptors are changing investing - focus on developing markets
17:15 - 17:45
Investment
- Seizing an opportunity to capture the way populations save and invest
- Growth in demand for brokers and analysts and what this means

Views from different jurisdictions - regulatory best practice
17:45 - 18:20
Operations, risk and compliance

Participants
Moderator: Stephane Janin - Head of Global Regulatory Development, AXA Investment Managers
Panelist: Andrea Parisi - Deputy Director General, Italy
Panelist: Leonora Xhekaj - Head of Operational Risk Management, Voya Investment Management
Panelist: Fiona Horsewill - Head of Product Development and Strategy, EMEA, Citi
Panelist: Viktor Fischer - Group Executive Board Member, ACOLIN

Panel discussion: How insurers view asset managers and vice versa
17:50 - 18:25
Distribution

Participants
Moderator: Dr Oliver Roll - Founding Partner, 4AlphaDrivers
Panelist: Christof Kessler - CEO, Gothaer Asset Management
Panelist: Jean-Francois Garin - CEO, Groupama Gan Vie

Panel discussion: Finding a balance - liquid and illiquid assets in clients' portfolios
17:45 - 18:20
Investment
- What does best practice look like
- Conservatist versus opportunistic
- Minimising risk and strategies that you can deploy

What fund buyers really want to know
16:45 - 17:15
Investment

Participants
Moderator: Andrew Summers - Head of Collectives & Fund Research, Investec Wealth & Investment
Panelist: Mussie Kidane - Head of Fund Selection, Pictet
Panelist: Justin Onuekwusi - Fund Manager, Head of Retail Multi-Asset Funds, Legal & General Investment Management

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FundForum International
06 October - 08 October 2020
Grimaldi Forum
Monaco

informaconnect.com/fundforum-international/
info.events@informaconnect.com
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<td>14:20 - What does the new age client experience look like in practice?</td>
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<td>15:00 - New models of engagement part 2</td>
<td>15:25 - Panel discussion: What is the ideal strategic asset allocation?</td>
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<td>15:30 - Conversation: How are asset managers increasing their productivity – views from outside the industry</td>
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<td>08:30 - 08:55</td>
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<td>Power Keynotes</td>
<td>What does Capitalism 2.0 look like post Covid-19 and who will be the new leaders? Why moving from a global economic era of wealth creation to one of wealth distribution presents huge opportunities for innovative active asset managers and wealth advisors</td>
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<td>08:55 - 09:20</td>
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<td>The Rana Foroohar Leaders Interview: Imagine 2030 – How do we deliver millions of savers’ short and long-term incomes now? What kind of new global economy is emerging and how must we rethink risk management &amp; investment in the light of new geopolitical and environmental pressures</td>
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<td>09:20 - 09:50</td>
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<td>How should central banks, governments or financial markets respond to mitigating these risks of climate, global health and inequality? Policy or innovation?</td>
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<td>Keynote global economic briefing – global health, climate change and inequality: structural drivers that are bringing the house down. How the new economy is driving both and how we can respond</td>
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<td>11:15 - 11:20</td>
<td>Chair’s opening remarks</td>
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<td>11:20 - 12:10</td>
<td>FundForum Plenary</td>
<td>Lessons for investment management leaders</td>
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<td>12:10 - 12:45</td>
<td>FundForum Plenary</td>
<td>Spotlight on pan-European pension investors: How to navigate between demographics, QE and supra-national mandatory regulations</td>
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**Participants**

**Presenters**

- Rana Foroohar - Global Business Columnist, Associate Editor, FINANCIAL TIMES & global economic analyst, CNN
- Sanjiv Sawhney - Global Head of Funds Global Transaction Services, Citi
- Megan Greene - Dame DeAnne Julius Senior Fellow in International Economics at Chatham House; Senior Fellow at the Mossavar-Rahmani Center for Business and Government, Harvard Kennedy School
- Sherry Madera - Global Head Industry & Government Affairs, Refinitiv
- Daniel Hanna - Global Head, Sustainable Finance, Standard Chartered Bank
- Saker Nusseibeh - CEO, HERMES INVESTMENT MANAGEMENT
- Euan Munro, FIA - CEO, AVIVA INVESTORS
- Katherine Garrett-Cox - Managing Director and Chief Executive Officer, Gulf International Bank (UK) Limited (GIB UK)
- Adam Matthews - Director of Ethics and Engagement for the Church of England Pensions Board, as well as Co-Chair of the Transition Pathway Initiative and a Board Member of the Institutional Investors Group on Climate Change, (IIGCC), Church Of England Pension Board
- Jean Raby - CEO, Natixis Investment Managers
- Major Tim Peake CMG - Astronaut, Astronaut
- Olivier Rousseau - Executive director, FRR (The French pension reserve fund)
- Christian Boehm - Chief Executive Officer, APK Pensionskasse AG

**Introducers**

- Jenny Johnson - President & CEO, Franklin Templeton
- Hendrik Du Toit - Chief Executive Officer, Investec Asset Management
- Keith Skeoch - CEO, Aberdeen Standard Investments
- Patrick Zweifel - Chief Economist, Pictet Asset Management
- Dr Oliver Roll - Founding Partner, 4AlphaDrivers
- Olivier Rousseau - Executive director, FRR (The French pension reserve fund)
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**Moderators**

- Patrick Zweifel - Chief Economist, Pictet Asset Management
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- Adam Matthews - Director of Ethics and Engagement for the Church of England Pensions Board, as well as Co-Chair of the Transition Pathway Initiative and a Board Member of the Institutional Investors Group on Climate Change, (IIGCC), Church Of England Pension Board

**Panelists**

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**Interviewers**

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- Sherry Madera - Global Head Industry & Government Affairs, Refinitiv
- Daniel Hanna - Global Head, Sustainable Finance, Standard Chartered Bank
- Saker Nusseibeh - CEO, HERMES INVESTMENT MANAGEMENT
- Euan Munro, FIA - CEO, AVIVA INVESTORS
- Katherine Garrett-Cox - Managing Director and Chief Executive Officer, Gulf International Bank (UK) Limited (GIB UK)
- Adam Matthews - Director of Ethics and Engagement for the Church of England Pensions Board, as well as Co-Chair of the Transition Pathway Initiative and a Board Member of the Institutional Investors Group on Climate Change, (IIGCC), Church Of England Pension Board
- Jean Raby - CEO, Natixis Investment Managers

**Chair**

- Daron Pearce - CEO, BNY Mellon EMEA Asset Servicing
# Sessions

## Main Conference Day Two - 07/10/2020

### Mastermind in 20 minutes: Realise the power of the asset management community - aligning culture with client needs

**12:45 - 13:05**  
**FundForum Plenary**

- How all stakeholders can work better together  
- Ways to enhance trust both internally and externally  
- Why is this important? Bringing it back to the end user  

**Participants**  
**Participant: Christophe Caspar** - Global CEO Asset Management, Edmund de Rothschild

### Networking lunch

**13:05 - 14:30**  
**Discussions - focus on regulation**

1. Examining the UK value for money legislation  
2. MiFID 2 - overcoming implementation challenges  
3. Fast forward six months - reviewing the senior management regime for asset management standards  
4. Where is derivatives regulation going? Implications for institutional clients  
5. What is the latest regulation on money market funds?

### Opening remarks

**14:30 - 14:35**  
**Distribution**

### Opening remarks

**14:30 - 14:35**  
**Operations, risk and compliance**

### Opening remarks

**14:30 - 14:35**  
**Investment**

### Alternative action

**14:35 - 15:10**  
**Distribution**

- Given uncertainty in equities and sovereign bonds hounded by negative yields, what are the alternatives to the traditional balanced portfolio of shares and bonds?  
- Alternative action in a variety of forms, including gold, art, private equity, hedge funds and real estate  

**Participants**

- **Moderator: Yuri Bender** - Editor in Chief, Professional Wealth Management, Financial Times  
- **Actor: James Bevan** - CIO, CCLA  
- **Actor: Suzanne Gyorgy** - Head of Art Advisory and Finance, Citi Private Bank  
- **Actor: Leah Cox** - Co-founder, IANUA Market  
- **Actor: Marc Syz** - CEO, Syz Capital

### Increasing efficiencies - what good operational governance looks like

**15:05 - 15:40**  
**Operations, risk and compliance**

- The operational risks that can give rise to a 'governance gap'  
- Looking at the effective governance of costs across the value chain – including some new AMX research on the impact of incorrect fund structuring

**Participants**

- **Participant: Aaron Overy** - Head of Client and Manager Development, The Asset Management Exchange (AMX)  
- **Participant: Alain Mandy** - Vice President and Chief Operating Officer, Wellington Management Funds Global  
- **Participant: Mario de Bergolis** - Chief Operating Officer, Asset Management One International Ltd

### Panel discussion: How can you invest well?

**15:05 - 15:35**  
**Investment**

- What investing well looks like in the changed world  
- Impact investing and opportunities across the different asset classes  
- Beyond risk management, what do you need to know

**Participants**

- **Participant: Patrick Flaton** - Managing Partner, Avignon Capital  
- **Participant: Rennie Hoare** - Partner and Head of Philanthropy, C. Hoare & Co.  
- **Participant: Neil Beaton** - Partner and Chief Investment Officer, Alvarium

### Panel discussion: Sustaining best practice in distribution models and strategies globally

**15:10 - 15:35**  
**Distribution**

- The importance of providing a great digital experience  
- The right tools can help you ensure a great UX across multiple investor types, countries and languages  
- How automation can help enhance distribution processes

**Participants**

- **Panelist: Patrick McKenna** - Global Head of Product Engineering, Kurtosys

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**Informa Connect**  
**+44 (0)20 7017 7200**  
**informaconnect.com/fundforum-international**  
**info.events@informaconnect.com**
Drilling down to the core - what selectors need to focus on when evaluating managers
15:35 - 16:10
Distribution

Participants
Panelist: Georg Skare Lund - Head of Fund Selection, STOREBRAND ASSET MANAGEMENT
Panelist: Susanne Bolin Gärtner - Head of Manager and Fund Selection, Danske Bank
Panelist: Fredrik Wilander - Research Director, Grieg Investor
Panelist: Claudia Stanghellini - Head of External Management, AP3
Panelist: Mia Söderberg - Senior Portfolio Manager in Alternative Investments & Manager Selection, Formerly Nykredit Asset Management

Presentation: What does the modern-day model portfolio look like?
15:35 - 16:10
Investment

- Diversification as a means of greater flexibility in managing investments
- Increasing need for income reliability - the SMA appeal
- Empowering the investor - owning the securities that matter and impact them most

Panel discussion: Maximising the value of the manager's data
15:40 - 16:15
Operations, risk and compliance

- Acquiring data and intelligence via digital sources
- Balancing risk when using technical systems

Participants
Presenter: Calum Muskett - Chief Commercial Officer, KNEIP

Afternoon break
16:15 - 16:40

Panel discussion: Aligning your distribution strategy - focus on private banks
16:40 - 17:10
Distribution

- Current thinking around distribution strategies
- Distribution channels - the needs of millennials
- Human versus machine - what is the future for private banks?

Participants
Panelist: Stéphane Monier - Group Managing Director, Chief Investment Officer, Banque Lombard Odier & Cie SA
Panelist: Francesco Grosoli - CEO, Compagnie Monégasque de Banque (CMB)
Panelist: Jean-Christophe Gerard - Head of Private Bank Europe, Monaco and Switzerland, CEO, Barclays Monaco

Presentation: What are the approaches to settlements?
16:40 - 17:10
Operations, risk and compliance

- Examining settlement solutions and systems
- What are the required specifications?
- Which products are they providing to their partners?

Quickfire session: Is there value in investing in...
16:40 - 17:15
Investment

Africa? Is there value in investing in Latin America? Are developing markets offering better returns than developed markets?

Participants
Speaker: Manraj Sekhon - Chief Investment Officer, Emerging Markets Equity, Franklin Templeton Investments

Panel discussion: Talking transformation - the changing role of the Head of Fund Selection
17:10 - 17:40
Distribution

- Examining the changing skillset
- Everything you need to know: selecting managers and funds

Participants
Moderator: Albert Reiter CFA - Managing Director, e-fundresearch.com Data GmbH & InvestRFP
Speaker: Sai Tampi - Managing Director, Global Head of Funds & ETFs, HSBC Private Banking
Speaker: Gustaf Runius - Global Head Product Strategy, SEB
Speaker: Jasmine Yu - Head of Manager Research, BNY Mellon

In conversation: Focus on asset servicers
17:10 - 17:40
Operations, risk and compliance

- What is on the asset servicers' wish list?
- Who are the disruptors?
- Impacts on the industry value chain

Participants
Moderator: Tony Gaughan - Global Asset Management Sector Leader, Deloitte

Panel discussion: Opportunities abound in China
17:15 - 17:45
Investment

- Go fast and furious but with a plan
- China as an asset destination – the latest MSCI guidelines
- Dissecting the misconception around high risk, liquidity and exploring products on offer

Panel discussion: The new investment vehicles for family offices
17:40 - 18:20
Distribution

- What is their criteria - the value of more niche asset classes
- The appeal of cash alternatives
- Illiquid versus liquid assets

Participants
Moderator: Théodore Economou - CIO, Multi-Asset, Lombard Odier Asset Management (Switzerland) SA
Participant: Rania Azmi - Founder and Member, Alexandrite Decisions and Wharton's Executive Advisory Boards
Panel discussion: Where do we go next?  
Beyond the survey findings  
17:40 - 18:15  
Operations, risk and compliance  
- Supporting the growth of asset managers  
- Managing the ongoing regulatory changes and pace of technological change  

Participants  
**Moderator:** Tony Gaughan - Global Asset Management Sector Leader, Deloitte  
**Panellist:** Mike Tumilty - Global Chief Operating Officer, Standard Life Aberdeen  

Power 30 minutes  
17:45 - 18:15  
Investment  
A collection of fast-paced presentations from asset managers pitching the rationale behind their fund. Fund buyers will judge the presentations and there will be a live audience vote.  

Close of day 2 conference sessions  
18:20 - 18:25  

The IM|Power Party - hosted by CACEIS  
21:05 - 00:35
<table>
<thead>
<tr>
<th>TIME</th>
<th>DISTRIBUTION</th>
<th>FUNDFORUM PLENARY</th>
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<td>08:00</td>
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<td>08:25 - Opening remarks</td>
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<td>08:30 - What does Capitalism 2.0 look like post Covid-19 and who will be the new leaders? Why moving from a global economic era of wealth creation to one of wealth distribution presents huge opportunities for innovative active asset managers and wealth advisors</td>
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<td>08:55 - The Rana Farooohar Leaders Interview: Imagine 2030 – How do we deliver millions of savers’ short and long-term incomes now? What kind of new global economy is emerging and how must we rethink risk management &amp; investment in the light of new geopolitical and environmental pressures</td>
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<td>09:00</td>
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<td>09:20 - Keynote global economic briefing – global health, climate change and inequality: structural drivers that are bringing the house down. How the new economy is driving both and how we can respond</td>
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<td>09:35 - How should central banks, governments or financial markets respond to mitigating these risks of climate, global health and inequality? Policy or innovation?</td>
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<td>10:30 - Morning break</td>
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<td>10:00 - CEOs on innovation and closing the Climate Action Gap – What are key asset owners and asset management leaders advocating for future-proofing their businesses in the face of ESG risks?</td>
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<td>11:15 - Chair’s opening remarks</td>
<td>11:20 - Presentation: 10 questions: How the ageing population will affect the fund industry</td>
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<td>Presentation: What you can do to win customers</td>
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<td>2020 talking points: Moving the industry forward</td>
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Participants:
- **Presenter**: Ronan Harrington - CEO, Alter Ego; Political Strategist, Extinction Rebellion
- **Moderator**: Paul Lim - Vice President, Asset Management and Impact Investing Group, BackBay Communications
- **Speaker**: Vikram Gandhi - Professor in Entrepreneurial Management and Impact Investing, Harvard Business School
- **Presenter**: Holly Mackay - Founder and CEO, Boring Money
- **Moderator**: Steve Barnett - Financial Centre Development Director, Abu Dhabi Global Market
- **Participant**: Andy Mantel - Founder & CEO, Pacific Sun Advisors
- **Participant**: Shelley Yang, CFA - CEO and Founder, InvesTAO
- **Participant**: Peter Lejre - Senior Executive Officer, McKinley Capital
- **Participant**: Ebele Okeke - Managing Partner, Altica Partners
- **Participant**: Russell Read - Group Managing Partner, C Change Group

**How to stay relevant for the next generation of talent: how impact is not only the biggest customer opportunity of our era, but also the future of investment management**

Before we rush to produce solutions, have we listened to what our customers actually want?

Networking lunch

Focused workshop on MEASA - What are the investment opportunities and how can you access these markets?

Before we rush to produce solutions, have we listened to what our customers actually want?

Panel discussion: What we can learn from China now and in the future

New for this year, this interactive session will debate the potential investment opportunities in the Middle East, Africa and South Asia. Come along and find out which markets you should be considering.

Participants:
- **Moderator**: Andy Mantel - Founder & CEO, Pacific Sun Advisors
- **Moderator**: Steve Barnett - Financial Centre Development Director, Abu Dhabi Global Market
- **Participant**: Peter Lejre - Senior Executive Officer, McKinley Capital
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**Regulation – is it fit for purpose?**

- Is there an added value to the recent requirements added in the last few years? How do you coordinate different standards across borders? Does more regulation give more protection to investors or does it hinder the availability of bespoke products?

**Speaking the same language: boutiques and big asset managers**

- What are the differences and similarities in challenges they face and how to transform business practices for the better
| TIME | FUNDFORUM PLENARY | IM|POWER KEYNOTES |
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| 08:00 |                  | 08:45 - Opening remarks |
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| 14:00 | 14:45 - 2020 talking points: Moving the industry forward | |
| 15:00 | 15:00 - End of FundForum International | 15:00 - End of FundForum International |