

### APFI breakfast

07:00 - 07:45  
Breakfast briefing

#### Participants

**Moderator: Adam Choppin** - Manager Research – International Equities, FIS Group, Inc.

**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  
IMJPower Keynotes

#### Participants

**Presenter: Jenny Adams** - Global Executive Producer, IMJPower

### 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  
IMJPower Keynotes

#### Participants

**Speaker: Alex Birkin** - Partner, EMEA 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  
IMJPower Keynotes

#### Participants

**Moderator: Edward Glyn** - Managing Director, Head of Global Markets, Calastone

**Panellist: Robert Fairbairn** - Vice Chairman, BlackRock

**Panellist: Gail Weiss** - President and Chief Trust Officer, Aon Trust

**Panellist: 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  
IMJPower Keynotes

#### Participants

**Moderator: Daron Pearce** - CEO, BNY Mellon EMEA Asset Servicing

**Panellist: Daniel Andemeskel** - Director - Head of Innovation Management, Universal-Investment

**Panellist: Dean Brown** - EY UK Wealth and Asset Management Advisory Partner, EY

### Digital innovation from the Asia perspective

09:40 - 09:50  
IMJPower 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  
IMJPower Keynotes

#### Participants

**Speaker: Joe Saliba** - Deputy Chief Executive Officer, CACEIS

**Panellist: 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

**Panellist: 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

**Panellist: Jeffrey Bloom** - Senior Relationship Manager, UBS Global Wealth Management

**Moderator: Jenny Adams** - Global Executive Producer, IMJPower

**Panellist: Lane Prenevost** - 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

**Participant: Seema Shah** - Chief Strategist, Principal Global Investors (Europe)

**Participant: Stuart Parker** - President & CEO, PGIM Investments

**Participant: John Emerson** - Former US Ambassador to Germany (ret.), Global Relationship Manager & Vice Chairman, Capital Group International, Inc

**Moderator: Rochelle Antoniewicz** - Senior Director of Industry & Financial Analysis, Investment Company Institute

**Participant: 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 Carlbring** - 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

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### 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 Corzaletti** - 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)

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### 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

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### What fund buyers really want to know

16:45 - 17:15

Investment

#### Participants

**Moderator: Andrew Summers** - Head of Collectives & Fund Research, Investec Wealth & Investment

**Panellist: Mussie Kidane** - Head of Fund Selection, Pictet

**Panellist: Justin Onuekwusi** - Fund Manager, Head of Retail Multi-Asset Funds, Legal & General Investment Management

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### 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

**Panellist: Alberto Herranz** - Investment Research & Risk Analysis, Allfunds

**Panellist: Martin Fenner** - Head Global Investment Marketing & Business Solutions, J. Safra Sarasin

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### 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
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### 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
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### 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

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### 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
- 

### Panel discussion: How insurers view asset managers and vice versa

17:50 - 18:25

Distribution

#### Participants

**Moderator: Dr Oliver Roll** - Founding Partner, 4AlphaDrivers

**Panellist: Christof Kessler** - CEO, Gothaer Asset Management

**Panellist: Jean-Francois Garin** - CEO, Groupama Gan Vie

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### IM|Power drinks reception

18:25 - 19:55

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# SCHEDULE

MAIN CONFERENCE DAY ONE - 06/10/2020

FundForum International

06 October - 08 October 2020

Grimaldi Forum  
Monaco

TIME	BREAKFAST BRIEFING	DISTRIBUTION	FUNDFORUM PLENARY	IMIPOWER KEYNOTES	INVESTMENT	OPERATIONS, RISK AND COMPLIANCE
<b>07:00</b>	07:00 - APFI breakfast 07:45 - Registration and coffee	07:45 - Registration and coffee	07:45 - Registration and coffee	07:45 - Registration and coffee	07:45 - Registration and coffee	07:45 - Registration and coffee
<b>08:00</b>				08:15 - Welcome  08:30 - 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  08:40 - 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		

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Monaco

TIME	BREAKFAST BRIEFING	DISTRIBUTION	FUNDFORUM PLENARY	IMIPOWER KEYNOTES	INVESTMENT	OPERATIONS, RISK AND COMPLIANCE
09:00				<p><b>09:10</b> - 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</p> <p><b>09:40</b> - Digital innovation from the Asia perspective</p> <p><b>09:50</b> - 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</p>		
10:00			10:20 - Morning break			
11:00			<p><b>11:05</b> - 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?</p> <p><b>11:45</b> - How the biggest buyers from the global financial institutions are rethinking strategic partnerships with asset managers in the light of global macro shifts</p>			

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TIME	BREAKFAST BRIEFING	DISTRIBUTION	FUNDFORUM PLENARY	IMIPOWER KEYNOTES	INVESTMENT	OPERATIONS, RISK AND COMPLIANCE
12:00			<p><b>12:15</b> - Who and what is shaking up the fund industry</p> <p><b>12:35</b> - CEO insight – recalibrating the business and investment model to the macro challenges and opportunities of the global economic reset</p>			
13:00			<p><b>13:00</b> - Networking lunch and hosted discussion roundtables</p>			
14:00		<p><b>14:15</b> - Opening remarks</p> <p><b>14:20</b> - What does the new age client experience look like in practice?</p>			<p><b>14:15</b> - Opening remarks</p> <p><b>14:20</b> - Power hour</p>	<p><b>14:15</b> - Opening remarks</p> <p><b>14:20</b> - Panel discussion: Recalculating back office processes</p>
15:00		<p><b>15:00</b> - New models of engagement part 2</p> <p><b>15:30</b> - A new era – data and the changing distribution model</p>			<p><b>15:25</b> - Panel discussion: What is the ideal strategic asset allocation?</p>	<p><b>15:00</b> - Data, tech and digitalisation: transforming operations</p> <p><b>15:30</b> - Conversation: How are asset managers increasing their productivity – views from outside the industry</p>
16:00	<p><b>16:15</b> - Afternoon tea</p>	<p><b>16:15</b> - Afternoon tea</p> <p><b>16:45</b> - Presentation: Exploring the role of sub advice in distribution models</p>	<p><b>16:15</b> - Afternoon tea</p>	<p><b>16:15</b> - Afternoon tea</p>	<p><b>16:15</b> - Afternoon tea</p> <p><b>16:45</b> - What fund buyers really want to know</p>	<p><b>16:15</b> - Afternoon tea</p> <p><b>16:45</b> - Conversation: Middle and back office outsourcing in asset management firms</p>

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TIME	BREAKFAST BRIEFING	DISTRIBUTION	FUNDFORUM PLENARY	IMIPOWER KEYNOTES	INVESTMENT	OPERATIONS, RISK AND COMPLIANCE
17:00		<p>17:15 - Panel discussion: The delegated investment solutions showdown</p> <p>17:50 - Panel discussion: How insurers view asset managers and vice versa</p>			<p>17:15 - How disruptors are changing investing - focus on developing markets</p> <p>17:45 - Panel discussion: Finding a balance - liquid and illiquid assets in clients' portfolios</p>	<p>17:15 - Presentation: Drive towards personalisation - how to serve your clients better</p> <p>17:45 - Views from different jurisdictions - regulatory best practice</p>
18:00	18:25 - IMIPower drinks reception	18:25 - IMIPower drinks reception	18:25 - IMIPower drinks reception	18:25 - IMIPower drinks reception	18:25 - IMIPower drinks reception	18:25 - IMIPower drinks reception

### Opening remarks

08:25 - 08:30  
IMJPower Keynotes

**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**

08:30 - 08:55  
IMJPower Keynotes

### Participants

**Presenter: Rana Foroohar** - Global Business Columnist, Associate Editor, FINANCIAL TIMES & global economic analyst, CNN

**Introducer: Sanjiv Sawhney** - Global Head of Funds Global Transaction Services, Citi

**The Rana Farooah 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 & investment in the light of new geopolitical and environmental pressures**

08:55 - 09:20  
IMJPower Keynotes

### Participants

**Interviewer: Rana Foroohar** - Global Business Columnist, Associate Editor, FINANCIAL TIMES & global economic analyst, CNN

**Panellist: Jenny Johnson** - President & CEO, Franklin Templeton

**Panellist: Hendrik Du Toit** - Chief Executive Officer, Investec Asset Management

**Panellist: Keith Skeoch** - CEO, Aberdeen Standard Investments

**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**

09:20 - 09:35  
IMJPower Keynotes

### Participants

**Presenter: 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

**How should central banks, governments or financial markets respond to mitigating these risks of climate, global health and inequality? Policy or innovation?**

09:35 - 10:00  
IMJPower Keynotes

From a carbon tax to enshrining intergenerational responsibility in law, what do asset owners and policy makers think is the best way for financial markets to mitigate climate risk. Do financial markets damage the environment by fuelling economic growth or do they make economies more prone to investment in technologies and infrastructures to mitigate climate risk?

### Participants

**Moderator: 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

**Panellist: Sherry Madera** - Global Head Industry & Government Affairs, Refinitiv

**Panellist: Daniel Hanna** - Global Head, Sustainable Finance, Standard Chartered Bank

**Panellist: Saker Nusseibeh** - CEO, HERMES INVESTMENT MANAGEMENT

**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?**

10:00 - 10:30  
IMJPower Keynotes

### Participants

**Panellist: Euan Munro, FIA** - CEO, AVIVA INVESTORS

**Panellist: Katherine Garrett-Cox** - Managing Director and Chief Executive Officer, Gulf International Bank (UK) Limited (GIB UK)

**Moderator: 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

**Panellist: Jean Raby** - CEO, Natixis Investment Managers

### Morning break

10:30 - 11:15

### Chair's opening remarks

11:15 - 11:20  
FundForum Plenary

### Participants

**Chair: Daron Pearce** - CEO, BNY Mellon EMEA Asset Servicing

**Presentation: 10 questions: How the ageing population will affect the fund industry**

11:20 - 11:40  
FundForum Plenary

### Participants

**Presenter: Patrick Zweifel** - Chief Economist, Pictet Asset Management

### Lessons for investment management leaders

11:40 - 12:10  
FundForum Plenary

### Participants

**Presenter: Major Tim Peake CMG** - Astronaut, Astronaut

**Spotlight on pan-European pension investors: How to navigate between demographics, QE and supra-national mandatory regulations**

12:10 - 12:45  
FundForum Plenary

### Participants

**Moderator: Dr Oliver Roll** - Founding Partner, 4AlphaDrivers

**Participant: Olivier Rousseau** - Executive director, FRR (The French pension reserve fund)

**Participant: Christian Boehm** - Chief Executive Officer, APK Pensionskasse AG



### 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

### Presentation: How distributed ledger technologies are transforming back office operational change

14:35 - 15:05

Operations, risk and compliance

### Panel discussion: How value investment is driving the asset managers' product development process

14:35 - 15:05

Investment

- Beyond product development, how are asset managers delivering and sustaining impact
- Given the shift in global investment needs, what is important going forward
- Is value enough or should we be reaching higher?

#### Participants

**Speaker: Kirk West** - Executive Director, International & CEO Asia, Principal Global Investors

### 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

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

### Drilling down to the core - what selectors need to focus on when evaluating managers

15:35 - 16:10

Distribution

#### Participants

**Panellist: Georg Skare Lund** - Head of Fund Selection, STOREBRAND ASSET MANAGEMENT

**Panellist: Susanne Bolin Gärtner** - Head of Manager and Fund Selection, Danske Bank

**Panellist: Fredrik Wilander** - Research Director, Grieg Investor

**Panellist: Claudia Stanghellini** - Head of External Management, AP3

**Panellist: 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

**Panellist: Stéphane Monier** - Group Managing Director, Chief Investment Officer, Banque Lombard Odier & Cie SA

**Panellist: Francesco Grosoli** - CEO, Compagnie Monégasque de Banque (CMB)

**Panellist: 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

# SESSIONS

MAIN CONFERENCE DAY TWO - 07/10/2020

FundForum International

06 October - 08 October 2020

Grimaldi Forum  
Monaco

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## 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

**Panelist: Mike Tumilty** - Global Chief Operating Officer, Standard Life Aberdeen

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## 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.

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## Close of day 2 conference sessions

18:20 - 18:25

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## The IM|Power Party - hosted by CACEIS

21:05 - 00:35

# SCHEDULE

MAIN CONFERENCE DAY TWO - 07/10/2020

FundForum International

06 October - 08 October 2020

Grimaldi Forum  
Monaco

TIME	DISTRIBUTION	FUNDFORUM PLENARY	IMIPOWER KEYNOTES	INVESTMENT	OPERATIONS, RISK AND COMPLIANCE
08:00			<p><b>08:25</b> - Opening remarks</p> <p><b>08:30</b> - 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</p> <p><b>08:55</b> - The Rana Faroohar 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</p>		
09:00			<p><b>09:20</b> - 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</p> <p><b>09:35</b> - How should central banks, governments or financial markets respond to mitigating these risks of climate, global health and inequality? Policy or innovation?</p>		

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10:00	10:30 - Morning break	10:30 - Morning break	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? 10:30 - Morning break	10:30 - Morning break	10:30 - Morning break
11:00		11:15 - Chair's opening remarks 11:20 - Presentation: 10 questions: How the ageing population will affect the fund industry 11:40 - Lessons for investment management leaders			
12:00		12:10 - Spotlight on pan-European pension investors: How to navigate between demographics, QE and supra-national mandatory regulations 12:45 - Mastermind in 20 minutes: Realise the power of the asset management community - aligning culture with client needs			
13:00	13:05 - Networking lunch	13:05 - Networking lunch	13:05 - Networking lunch	13:05 - Networking lunch	13:05 - Networking lunch
14:00	14:30 - Opening remarks 14:35 - Alternative action			14:30 - Opening remarks 14:35 - Panel discussion: How value investment is driving the asset managers' product development process	14:30 - Opening remarks 14:35 - Presentation: How distributed ledger technologies are transforming back office operational change

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TIME	DISTRIBUTION	FUNDFORUM PLENARY	IMIPOWER KEYNOTES	INVESTMENT	OPERATIONS, RISK AND COMPLIANCE
<b>15:00</b>	<p><b>15:10</b> - Panel discussion: Sustaining best practice in distribution models and strategies globally</p> <p><b>15:35</b> - Drilling down to the core - what selectors need to focus on when evaluating managers</p>			<p><b>15:05</b> - Panel discussion: How can you invest well?</p> <p><b>15:35</b> - Presentation: What does the modern-day model portfolio look like?</p>	<p><b>15:05</b> - Increasing efficiencies - what good operational governance looks like</p> <p><b>15:40</b> - Panel discussion: Maximising the value of the manager's data</p>
<b>16:00</b>	<p><b>16:15</b> - Afternoon break</p> <p><b>16:40</b> - Panel discussion: Aligning your distribution strategy - focus on private banks</p>	<b>16:15</b> - Afternoon break	<b>16:15</b> - Afternoon break	<p><b>16:15</b> - Afternoon break</p> <p><b>16:40</b> - Quickfire session: Is there value in investing in...</p>	<p><b>16:15</b> - Afternoon break</p> <p><b>16:40</b> - Presentation: What are the approaches to settlements?</p>
<b>17:00</b>	<p><b>17:10</b> - Panel discussion: Talking transformation - the changing role of the Head of Fund Selection</p> <p><b>17:40</b> - Panel discussion: The new investment vehicles for family offices</p>			<p><b>17:15</b> - Panel discussion: Opportunities abound in China</p> <p><b>17:45</b> - Power 30 minutes</p>	<p><b>17:10</b> - In conversation: Focus on asset servicers</p> <p><b>17:40</b> - Panel discussion: Where do we go next? Beyond the survey findings</p>
<b>18:00</b>	<b>18:20</b> - Close of day 2 conference sessions	<b>18:20</b> - Close of day 2 conference sessions	<b>18:20</b> - Close of day 2 conference sessions	<b>18:20</b> - Close of day 2 conference sessions	<b>18:20</b> - Close of day 2 conference sessions
<b>19:00</b>					
<b>20:00</b>					
<b>21:00</b>	<b>21:05</b> - The IM Power Party - hosted by CACEIS	<b>21:05</b> - The IM Power Party - hosted by CACEIS	<b>21:05</b> - The IM Power Party - hosted by CACEIS	<b>21:05</b> - The IM Power Party - hosted by CACEIS	<b>21:05</b> - The IM Power Party - hosted by CACEIS

### Opening remarks

08:45 - 09:00  
IMJPower Keynotes

### Listening to the voice of the next generation: What connects Extinction Rebellion, asset management and enabling systemic change?

09:00 - 09:30  
IMJPower Keynotes

### Participants

**Presenter: Ronan Harrington** - CEO, Alter Eg; Political Strategist, Extinction Rebellion

### 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

09:30 - 10:00  
IMJPower Keynotes

### Participants

**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

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

10:00 - 10:30  
IMJPower Keynotes

### Participants

**Presenter: Holly Mackay** - Founder and CEO, Boring Money

### Morning break

10:30 - 11:00

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

11:00 - 11:35  
FundForum Plenary

- Hear from asset managers who have entered China and perspectives from China fund managers entering Europe
- China – disruptor vs pioneer

### Participants

**Speaker: Andy Mantel** - Founder & CEO, Pacific Sun Advisors

**Speaker: Shelley Yang, CFA** - CEO and Founder, InvesTAO

### Presentation: What you can do to win customers

11:35 - 12:30  
FundForum Plenary

- What your customers want
- Exploring customer retention versus acquisition strategies
- Maximising efficiencies in the new reality

### Participants

**Presenter: Chris Adamkowski** - Head of Industry, Financial Services, Google

### Networking lunch

12:30 - 13:30

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

13:30 - 14:45  
FundForum Plenary

- What is the current framework for MEASA - how investors are approaching these markets
- Exploring the benefits of ME over Africa or does South Asia have more potential
- Putting plans into action - investment approaches going forward

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: Steve Barnett** - Financial Centre Development Director, Abu Dhabi Global Market

**Participant: Peter Lejre** - Senior Executive Officer, McKinley Capital

**Participant: Ebele Okeke** - Managing Partner, Altica Partners

**Participant: Russell Read** - Group Managing Partner, C Change Group

### 2020 talking points: Moving the industry forward

14:45 - 15:00  
FundForum Plenary

A series of interactive sessions where the audience can ask questions on the following topics:

Regulation – is it fit for purpose?

- Is there an added value to the recent requirements added in the last few years? How do you co-ordinate 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

### End of FundForum International

15:00 - 15:05

# SCHEDULE

MAIN CONFERENCE DAY THREE - 08/10/2020

FundForum International

06 October - 08 October 2020

Grimaldi Forum  
Monaco

TIME	FUNDFORUM PLENARY	IMIPOWER KEYNOTES
08:00		08:45 - Opening remarks
09:00		09:00 - Listening to the voice of the next generation: What connects Extinction Rebellion, asset management and enabling systemic change? 09:30 - 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
10:00	10:30 - Morning break	10:00 - Before we rush to produce solutions, have we listened to what our customers actually want? 10:30 - Morning break
11:00	11:00 - Panel discussion: What we can learn from China now and in the future 11:35 - Presentation: What you can do to win customers	
12:00	12:30 - Networking lunch	12:30 - Networking lunch
13:00	13:30 - Focused workshop on MEASA - What are the investment opportunities and how can you access these markets?	
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