



# GLOBAL INVESTMENT FORUMS

## CHICAGO TUESDAY, JUNE 7

TIME	SESSION/SPEAKER(S)	LOCATION
2:30–3:00 pm	<b>Registration</b>	Looking Glass Ballroom Foyer, third floor
3:00–5:30 pm	<b>Asset Manager Session</b>	Looking Glass Ballroom, third floor
6:00–8:30 pm	<b>Welcome Reception and Buffet Dinner for All Attendees</b>	Great Street, second floor

## WEDNESDAY, JUNE 8

TIME	SESSION/SPEAKER(S)	LOCATION
8:00–9:00 am	<b>Breakfast</b>	Looking Glass Ballroom, third floor
9:00–9:10 am	<b>Welcome and Opening</b> Rich Nuzum, Investments Business Leader, North America	Grand Ballroom, second floor
9:10–9:15 am	<b>MC Day One</b> Kelly Henson, Senior Investment Consultant	
9:15–9:55 am	<b>Investment Themes and Opportunities</b> Deb Clarke, Global Head of Investments Research  Panelists: Gordon Fletcher, Head of Delegated Defined Benefit Jay Love, US National Segment Leader, Defined Benefit Phil Suess, Senior Investment Consultant	
9:55–10:00 am	<b>Lightning Talk: Big Data in the Asset Management Industry</b> James LaFleur, Director of Client Consulting, East Market	

10:00–10:30 am	<b>Networking and Coffee Break</b>	Grand Ballroom Foyer
10:30–11:30 am	<b>Keynote Address — Economic Innovation: Keeping Corporations Competitive in the 21st Century</b> <b>Austan Goolsbee</b> , Chairman, President’s Council of Economic Advisers (2010–2011) and Professor of Economics, University of Chicago Booth School of Business	Grand Ballroom, second floor
11:30 am–noon	<b>Long-term Investing: From Theory to Practice</b> <b>Phil Edwards</b> , Director of Strategic Research, Europe	
Noon–1:00 pm	<b>Overcoming Hurdles to Long-term Investing: A Panel Discussion</b> Moderators: <b>Jason Blackwell</b> , Investment Consultant Panelists: <b>David Eisenberg</b> , Director of Client Consulting, North America <b>Shaila Karim</b> , Director of Global Trust Investments, RR Donnelley <b>Liz Koop</b> , Chief Investment Officer, EducationQuest Foundation <b>Ray Kanner</b> , Managing Director and Chief Investment Officer, IBM Retirement Funds	
1:00–2:30 pm	<b>Lunch</b>	Great Street, second floor
2:30–3:10 pm	<b>BREAKOUTS I</b>	
	<b>Are Your Investments Protected Against Cybersecurity Threats?</b> <b>Gregg Sommer</b> , Head of Mercer Sentinel’s ORA group, North America <b>Thomas Fuhrman</b> , Managing Director, Cyber Security Consulting and Advisory Services, Marsh Risk Consulting	Cloud Gate five, third floor
	<b>Investment Considerations for a DB Annuity Buyout</b> <b>Annie Bruneau</b> , Financial Strategist <b>Kevin Armant</b> , Senior Investment Consultant	Cloud Gate one, third floor
	<b>What Does the Future of DC Look Like?</b> <b>Katie Hockenmaier</b> , Investment Consultant <b>Liana Magner</b> , US DC Investment Leader	Grand Ballroom, second floor
	<b>What’s New in Retirement Income?</b> <b>Chuck Dobson</b> , Investment Consultant, DC & Financial Wellness <b>Neil Lloyd</b> , Head US DC & Financial Wellness Research	Cloud Gate three, third floor

3:10–3:50 pm	<b>BREAKOUTS II</b>	
	<b>Wealth Management: Surviving and Thriving Amid Regulatory Change</b> Nicole Kramer, Investment Consultant Bradley Kellum, Partner, Wealth & Asset Management and Retail & Business Banking, Oliver Wyman	Cloud Gate five, third floor
	<b>Investment Considerations for a DB Annuity Buyout</b> Annie Bruneau, Financial Strategist Kevin Armant, Senior Investment Consultant	Cloud Gate one, third floor
	<b>What Does the Future of DC Look Like?</b> Katie Hockenmaier, Investment Consultant Liana Magner, US DC Investment Leader	Grand Ballroom, second floor
	<b>What's New in Retirement Income?</b> Chuck Dobson, Investment Consultant, DC & Financial Wellness Neil Lloyd, Head US DC & Financial Wellness Research	Cloud Gate three, third floor
3:50–4:20 pm	<b>Networking and Coffee Break</b>	Grand Ballroom Foyer
4:20–5:10 pm	<b>Three Topical Investment Issues: Make Your Choice!</b> Shaum Shrinivas, Investment Consultant Stan Mavromates, Chief Investment Officer, North America	Grand Ballroom, second floor
5:10–5:20 pm	<b>Closing Remarks</b> Rich Dabrowski, Central Market Business Leader, Investments	
6:30–9:30 pm	<b>Cocktails and Offsite Dinner</b> Please gather in the main lobby at 6:00 pm for coach departures to the venue	

## THURSDAY, JUNE 9

TIME	SESSION/SPEAKER(S)	LOCATION
8:00–9:00 am	<b>Breakfast</b>	Looking Glass Ballroom, third floor
9:00–9:10 am	<b>Welcome</b> Marina Batliwalla, Senior Investment Consultant	Grand Ballroom, second floor
9:10–10:10 am	<b>The Importance of Population Dynamics</b> Prof. Sarah Harper, Director, The Oxford Institute for Population Ageing	
10:10–10:15 am	<b>Lightning Talk: Better Benchmarking</b> Chris Kohler, Director of Client Consulting, Not-For-Profit	
10:15–10:50 am	<b>The Next Frontier in Financial Wellness</b> Betsy Dill, US Financial Wellness Leader Derek Cushman, US Financial Wellness Solutions Leader	

10:50–11:20 am	<b>Networking and Coffee Break</b>	Grand Ballroom Foyer
11:20–11:25 am	<b>Lightning Talk: Robo Advisors — The Future of Wealth Management?</b> David Hyman, US Wealth Management Segment Leader	Grand Ballroom, second floor
11:25–11:50 am	<b>How to Succeed in Hedge Fund Investing</b> Lamar Small, Senior Hedge Fund Research Specialist	
11:50 am–12:10 pm	<b>Building Long-term Portfolios in a Short-term World</b> Travis Pruitt, US Proposition Leader, Not-For-Profit OCIO Kenneth Shimberg, Chief Investment Officer, Endowments & Foundations	
12:10–12:20 pm	<b>Concluding Remarks</b> Rich Nuzum, Investments Business Leader, North America	
12:30–1:45 pm	<b>Lunch</b>	Great Street, second floor

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