

MERCER GLOBAL INVESTMENT FORUMS

CHICAGO | JUNE 15–16, 2017



JUNE 14, WEDNESDAY

TIME	SESSION/SPEAKER(S)	LOCATION
16:00–16:45	Registration	Looking Glass Prefunction 3 rd Floor
16:45–19:00	Asset Manager Session	Looking Glass 3 rd Floor
19:00–21:00	Welcome Reception and Buffet Dinner	Great Street, 2 nd Fl

JUNE 15, THURSDAY

TIME	SESSION/SPEAKER(S)	LOCATION
07:45–08:45	Breakfast	Great Street, 2 nd Fl
08:45–08:55	Welcome and Opening Tom Murphy, US Wealth Leader	Grand Ballroom 2 nd Fl
08:55–09:00	MC Travis Pruitt, US Proposition Leader for Endowment & Foundation Delegated Services	
09:00–09:40	Through the Looking Glass: Reflecting on the Practicalities of Building Robust Portfolios in an Unpredictable World Deb Clarke, Global Head of Investment Research Liana Magner, US DC Investment Leader Gordon Fletcher, US Delegated DB Proposition Leader Jessica Portis, Investment Leader, Not-for-Profit Client Segment	
09:40–10:10	Creating Robust Reference Portfolios: Principles and Practicalities Jason Blackwell, Senior Investment Consultant Nick White, Global Director of Portfolio Construction Research	
10:10–10:20	Mind Games — Navigating Alternate Realities I Geoff Wilson, Senior Investment Consultant, Not-For-Profit Client Segment	
10:20–10:50	Networking and Coffee Break	Grand Ballroom Foyer
10:50–11:50	Keynote Address Aneesh Chopra, Chief Technology Officer of the United States (2009– 2012), Co-Founder and Executive Vice President, Hunch Analytics	

MAKE TOMORROW, TODAY



11:50–12:15	Will Bonds Bail You Out Next Time? Phil Edwards, Global Director of Strategic Research	Grand Ballroom 2 nd Fl
12:15–12:45	Building an Alternatives Portfolio Michael Forestner, Director of Private Markets Dave McMillan, Chief Investment Officer for Hedge Funds	
12:45–12:55	Mind Games — Navigating Alternate Realities II Geoff Wilson, Senior Investment Consultant, Not-For-Profit Client Segment	
12:55–14:10	Lunch	Great Street & Discover, 2 nd Fl
14:10–14:50	Breakout I DB Exit Strategy: Preparing Your Portfolio for Buyout Jared Dickow, Financial Strategist Reid Smith, Investment Consultant	Cloud Gate 5
	Achieving a Healthy Outlook: How to Survive and Thrive in This World of Individual Accountability Stacy Scapino, Senior Investment Consultant David Hyman, US Wealth Management Segment Leader	Cloud Gate 4
	What Are We Doing About Diversity? Michael Kinney, Senior Research Specialist, Equity Boutique Pam Jeffords, Global Sales Leader for MCG and When Women Thrive	Cloud Gate 3
	The Evolution of Delegation: Real Accounts of Success and Failure Seamus Britt, Client Portfolio Director John Nussbaumer, Senior Investment Consultant	Cloud Gate 1 & 2
	Future Makers and Future Takers: Managing Long-Term Systemic Risks Alex Bernhardt, Head of Responsible Investing Christine Bradford, Senior Investment Consultant	Grand Ballroom
14:50–15:30	Breakout II As above	
15:30–16:00	Networking and Coffee Break	Grand Ballroom Foyer
16:00–16:10	Lightning Talk: Fire Drill – How to React to Extreme Events Peter Grant, Senior Investment Consultant	
16:10–17:05	Globalization in a Fragile World: Is It Time for a Rethink? Andrew Kirton, Global Chief Investment Officer Anthony Brown, US Director of Strategic Research	
17:05–17:15	Final Thoughts Rich Dabrowski, Senior Investment Consultant	
18:00–21:35	Cocktails and Offsite Dinner Coach pick-up from the main hotel entrance at 5:30 pm; Cocktail reception at the Field Museum starts at 6:00 pm	The Field Museum

JUNE 16, FRIDAY

TIME	SESSION/SPEAKER(S)	LOCATION
08:00–09:00	Breakfast	Great Street, 2 nd Fl
09:00–09:05	MC Michael Schlachter , US Wealth Defined Benefit Segment Leader, Investments	Grand Ballroom, 2 nd Fl
09:05–10:05	Investing in a Future that is Gray, Delayed, Small, and Female Featured Speaker: Joe Coughlin , Founder and Director, MIT AgeLab	
10:05–10:15	Lightning Talk: Easy Wins: How to Leverage Human Behavior to Improve Member Outcomes Katie Hockenmaier , Investment Consultant	
10:15–10:25	Lightning Talk: The Evolving Landscape of Fintech Lindsey Staley , Investment Analyst	
10:25–10:55	Networking and Coffee Break	Grand Ballroom Foyer
10:55–11:25	Untangling the Active vs Passive Debate Jay Love , US Director of Strategic Research Sean Chatburn , Research Specialist, Equity Boutique	
11:25–11:55	Hire or Fire? The Rationale Behind Fund Manager Selection and Termination Stan Mavromates , Americas Chief Investment Officer (CIO)	
11:55–12:10	Mind Games — Navigating Alternate Realities III Geoff Wilson , Senior Investment Consultant, Not-For-Profit Client Segment	
12:10–12:20	Concluding Remarks Jacques Goulet , President, Health and Wealth	
12:20–13:55	Lunch	Great Street and Discover, 2 nd Fl