

AGENDA

Mercer Global Investment Forums

BOSTON | Tuesday and Wednesday October 22-23, 2019

Monday October 21, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
3:00PM-4:00PM	Asset Manager Briefing Registration	
4:00PM-6:55PM	Asset Manager Briefing	
7:00PM-9:00PM	Welcome Reception and Buffet Dinner	All Delegates

Tuesday October 22, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
7:30AM-8:45AM	Registration	
7:45AM-8:45AM	Breakfast	
8:45AM -9:00AM	Welcome and Opening Christine Mahoney, Wealth Leader, US	
9:00AM-9:45AM	Investment Themes, Reference Portfolios and Practical Application Deb Clarke, Global Head of Investment Research Nick White, Global Strategic Research Director Jay Love, US Investment Consulting Leader Liana Magner, DC Leader, Delegated Solutions, US	
9:45AM-9:50AM	MC Geoff Wilson, Senior Investment Consultant	
9:50AM-10:10AM	Mastering the Elements: How to Structure Income-Producing Portfolios Neil Lloyd, Head of US Defined Contribution and Financial Wellness Research Kenny Pitman, Senior Investment Consultant	

10:10AM-10:30AM	Game of Later Life – Concept and Round 1 Julija Kod, Investment Consultant
10:30AM-11:00AM	Networking and Coffee Break
11:00AM-12:00PM	Keynote Address: Michael Mauboussin, Investment Strategist and Author
12:00PM-12:30PM	Capturing Late Cycle Opportunities for Defensive Portfolios Nicholas Iselin, Senior Investment Consultant Shaum Shrinivas, Senior Investment Consultant
12:30PM-12:40PM	Game of Later Life – Round 2 Julija Kod, Investment Consultant
12:40PM-1:55PM	Lunch
1:55PM-2:30PM	Surveying the Asset Management Landscape: Trends and Portfolio Impacts Facilitator: Keith Mote, Not-for-Profit Business Leader, US Panelists: Rich Nuzum, President, Wealth Stephanie Braming, Global Head of Investment Management, William Blair Investment Management
2:30PM-3:05PM	Campfire Conversations: A Fireside Chat with Mercer Clients – Round 1 Managed Accounts: What Value Do They Bring DC Plans? Facilitator: Jennifer Flodin , DC Practice Leader Peggy Flynn , Pension and Post-Retirement Investment Manager, American Water Hedge Funds: Are They a Feasible Allocation? Facilitator: Texas Hemmaplardh, Co-Lead, Endowments <i>Clients to be Announced</i> Private Equity: Has it Peaked or is it Ready for Version 2.0? Facilitator: Beth Johnson, Senior Investment Consultant <i>Clients to be Announced</i> Applying ESG as a US Fiduciary Facilitator: Max Messervy, Responsible Investment Consultant <i>Clients to be Announced</i>
3:05PM-3:40PM	Campfire Conversations: A Fireside Chat with Mercer Clients – Round 2 As Above
3:40PM-4:10PM	Networking and Coffee Break

4:10PM-4:40PM	Investment Decision-Making: A Discussion on the Merits of Different Governance Models Facilitator: Katie Hockenmaier , Senior Investment Consultant <i>Clients to be Announced</i>	
4:40PM-5:05PM	The Magnificent Seven – Surfing the Waves of Opportunity Host: Jill Walker , Senior Investment Consultant Sustainability-themed Equity Nick Conant , Asset Class Specialist, Equity Boutique Frontier Markets Maggie Mueller , Asset Class Specialist, Equity Boutique China Onshore Bonds Conor Fitzell , Asset Class Specialist, Fixed Income Boutique Secured Finance Kenneth Zarske , Investment Consultant Insurance-linked Securities Jessica Shamshura , Investment Analyst Commodities Will Dillard , Investment Consultant Trend-following Strategies Megan Coffey , Asset Class Specialist, Hedge Fund Boutique	
5:05PM-5:15PM	Game of Later Life – Round 3 Julija Kod , Investment Consultant	
5:15PM-5:25PM	Day 1 Close Geoff Wilson , Senior Investment Consultant	
6:00PM-10:00PM	Drinks and Offsite Dinner	Museum of Fine Arts

Wednesday October 23, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
8:00AM-9:00AM	Breakfast	
9:00AM-9:05AM	MC Aruna Jain , Senior Investment Consultant	
9:05AM-9:15AM	Opening Remarks Martine Ferland , President and Chief Executive Officer	
9:15AM-9:45AM	Investing in a Time of Climate Change – Ramifications for Portfolios Alex Bernhardt , Head of Responsible Investment, US Christine Bradford , Senior Investment Consultant	
9:45AM-10:15AM	Tectonic Friction: Is the US or China the Best Place to Invest Going Forward? Anthony Brown , US Director of Capital Markets Susan McDermott , Senior Investment Consultant	
10:15AM-10:45AM	Networking and Coffee Break	
10:45AM-11:20AM	Opportunities in Private Markets and How They Fit into Your Portfolio Facilitator: Brad Young , Global Co-Chief Investment Officer, Private Markets Panelists: Harry Leggat , Head of Private Equity and Private Debt, US Raelan Lambert , Global Alternatives Leader, Private Debt Allison Yager , Global Alternatives Leader, Real Estate Amarik Ubhi , Global Alternatives Leader, Infrastructure	
11:20AM-12:00PM	Braving EM: Which is the Best Approach in this Late Cycle? Host: Kelly Henson , East Market DC Segment Leader 1. Emerging Market Equities Mark Stoner , Asset Class Specialist, Equity Boutique 2. Emerging Market Debt Linda Ko , Asset Class Specialist, Fixed Income Boutique 3. Emerging Market Infrastructure Sid Vittal , Asset Class Specialist, Alternatives	
12:00PM-12:10PM	Game of Later Life – Final Destination Julija Kod , Investment Consultant	
12:10PM-12:25PM	Bringing it All Together – Practical Application Chris Moore , Chief Investment Officer, Not-for-Profit	
12:30PM-1:45PM	Lunch	