

AGENDA

Mercer Global Investment Forums

Braving the Elements: Surfing the Late Cycle

TORONTO | Thursday and Friday, 20-21 June 2019

Wednesday 19 June, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
15:45–16:30	Asset Manager Registration	
16:30–18:55	Asset Manager Session	
19:00–21:00	Welcome Reception & Buffet Dinner	

Thursday 20 June, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
07:30–08:45	Registration	
07:45–08:45	Breakfast	
08:45–09:00	Welcome and Opening Jean-Philippe Provost , Wealth Leader, Canada	
09:00–09:45	2019 Investment Themes, Reference Portfolios and Practical Application Deb Clarke , Global Head of Investment Research Nick White , Global Strategic Research Director Yusuke Khan , Director of Strategic Research, Canada Todd Nelson , Senior Investment Consultant Linda Ko , Asset Class Specialist, Fixed Income Boutique	
09:45–09:50	MC TBC	
09:50–10:20	Introducing Equity 3.0 Sean Chatburn , Asset Class Specialist, Equity Boutique Mike McMurray , Senior Investment Consultant	

10:20–10:35	Game of Later Life – Concept & Round 1 Brett Jennings, Investment Consultant
10:35–11:05	Networking and Coffee Break
11:05–12:05	Keynote Address TBC
12:05–12:35	Tectonic Friction: Is the US or China the Best Place to Invest Going Forward? David Zanutto, Market Business Segment Leader Jay Love, Director of Strategic Research, USA
12:35–12:45	Storyslam: Making the Most of Currency Jonathan Croft, Senior Investment Consultant
12:45–12:55	Game of Later Life – Round 2 Brett Jennings, Investment Consultant
12:55–14:10	Lunch
14:10–14:45	Engagement and Decumulation Facilitator: Jillian Kennedy, Leader of DC and Financial Wellness, Canada David Knox, Senior DC Actuarial Consultant
14:45–15:20	Campfire Conversations: Fireside Chats with Mercer Clients – Round 1 What Really Drives the Alpha Hunter Facilitator: Ryan Anderson, Senior Investment Consultant Client 1 Client 2 Balancing Risk and Reward: What’s Driving Our Asset Allocation Decisions Facilitator: Gilles Lavoie, Senior Investment Consultant Client 1 Client 2 What Drives Our Implementation Decisions Facilitator: Carl Proulx, Senior Investment Consultant Client 1 Client 2 Improving the DC Member Experience Facilitator: Jillian Kennedy, Leader of DC Financial Wellness, Canada Client 1 Client 2
15:20–15:55	Campfire Conversations: Fireside Chats with Mercer Clients – Round 2
15:55–16:25	Networking and Coffee Break

16:25–16:45	Mastering the Elements: How to Structure an Income-Producing Portfolio Jeff Bunce , Asset Class Specialist, Fixed Income TBC
16:45–17:10	So You Want to Tilt your Equity Portfolio ... Facilitator: TBC Oh Canada! Patrick Graham , Asset Class Specialist, Equity Boutique It's Time for China A-Shares Kimberley Hart , Investment Consultant Small Cap is Where It's At! Irene Chan , Investment Consultant USA All the Way! Elena Demopoulos , Senior Investment Consultant Low Vol Forever! Misbah Lalani , Senior Investment Consultant Sustainability-Themed Equity Is the Future! Stacy Walters , Asset Class Specialist, Equity Boutique Frontier Markets Lead the Way Victoria Goh , Investment Consultant
17:10–17:20	Game of Later Life – Round 3 Brett Jennings , Investment Consultant
17:20–17:40	Keeping the End Goal in Mind – Implementation Dave Makarchuk , Investment Sales and Strategy Leader, Canada
17:40–18:00	Final Remarks TBC
18:00–22:00	Drinks & Offsite Dinner Royal Ontario Museum

Friday 21 June, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
08:00–09:00	Breakfast	
09:00–09:05	MC TBC	
09:05–09:35	<p>The Importance of Diversity and HR Transformation in the Asset Management Industry</p> <p>Host: Kevin Hendershot, Senior Client Management/Development Consultant</p> <p>Jaqui Parchment, CEO, Canada Ilana Hechter, Senior HR Effectiveness Consultant</p>	
09:35–10:05	<p>Investing in a Time of Climate Change – Ramifications for Portfolios</p> <p>Ryan Pollice, Senior Investment Consultant Max Messervy, Responsible Investment Consultant</p>	
10:05–10:35	Networking and Coffee Break	
10:35–10:55	<p>Profiling the DC Portfolio: Investing in 2020 and Beyond</p> <p>Pat Leo, Senior Investment Consultant Joseph Bevilacqua, Investment Consultant</p>	
10:55–11:15	<p>To Annuitize ... or Not to Annuitize ... A Question of DB Longevity Protection</p> <p>Manuel Monteiro, Senior DB Actuarial Consultant Hrvoje Lakota, MDDS Strategy Consultant</p>	
11:15–11:25	<p>Storyslam: Late Cycle Opportunities for Defensive Portfolios</p> <p>Venelina Arduini, Investment Consultant</p>	
11:25–12:05	<p>Braving EM: Which is the Best Approach in This Late Cycle?</p> <p>Host: Irfan Hassan, Investment Consultant</p> <ol style="list-style-type: none"> 1. EM Equities Samantha Cleyn, Senior Investment Consultant 2. EM Debt Chris Kamykowski, Asset Class Specialist, Fixed Income 3. EM Infrastructure Michael McGowan, Asset Class Specialist, Alternatives 	

12:05–12:15	Game of Later Life – Final Destination Brett Jennings , Investment Consultant
12:15–12:30	Bringing it All Together – Practical Application Dave Makarchuk , Investment Sales and Strategy Leader, Canada
12:30–12:35	Closing Remarks Rich Nuzum , President, Wealth
12:45–14:00	Lunch