

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	Canadian Foyer, Convention Floor
16:30-18:55	Asset Manager Briefing	Ontario, Convention Floor
19:00-21:00	Welcome Reception & Buffet Dinner	Imperial, Lobby

Thursday 20 June, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
07:30-08:45	Registration	Canadian Foyer, Convention Floor
07:45-08:45	Breakfast	Ontario, Convention Floor
08:45-09:00	Welcome and Opening Jean-Philippe Provost , Wealth Leader, Canada	Canadian, Convention Floor
09:00-09:45	2019 Investment Themes, Reference Portfolios and Practical Application Nick White , Global Strategic Research Director Yusuke Khan , Director of Strategic Research, Canada Todd Nelson , Wealth Business Leader, Toronto	
09:45-09:50	MC Teresa Palandra , Office Leader, Toronto	
09:50-10:20	Building Robust Equity Portfolios Michael McMurray , Senior Investment Consultant Sean Chatburn , Asset Class Specialist, Equity Boutique	

10:20-10:35	Game of Later Life – Concept & Round 1 Brett Jennings , Senior Investment Consultant	
10:35-11:05	Networking and Coffee Break	Canadian Foyer, Convention Floor
11:05-12:05	Keynote Address: Wealth in the Era of Artificial Intelligence Jonnie Penn , Google Fellow and Expert in Artificial Intelligence	
12:05-12:35	Tectonic Friction: Is the US or China the Best Place to Invest Going Forward? David Zanutto , Senior Investment Consultant Jay Love , Director of Strategic Research, USA	
12:35-12:45	Making the Most of Currency Jonathan Croft , Senior Investment Consultant	
12:45-12:55	Game of Later Life – Round 2 Brett Jennings , Senior Investment Consultant	
12:55-14:10	Lunch	Ontario, Convention Floor
14:10-14:45	Retirement Plans in a DC Environment Facilitator: Jillian Kennedy , Leader of DC and Financial Wellness, Canada David Knox , Senior Actuary and National Leader, Research and Policy, Australia Cara Bourdeau , Senior Human Resources Consultant, Total Rewards, Western University	
14:45-15:20	Campfire Conversations: Fireside Chats with Mercer Clients Round 1 What Really Drives the Alpha Hunter Facilitator: Samantha Cleyn , Senior Investment Consultant Naveed Mohammed , Head of Managed Asset Strategy and Analytics, BMO Nesbitt Burns Dustin Antonelli , Director, Investments Public Markets, Saskatchewan Health Employee's Pension Plan (SHEPP) Pierre Collins , Director, Investments, Fondation Lucie et André Chagnon Balancing Risk and Reward: What's Driving Our Asset Allocation Decisions Facilitator: Gilles Lavoie , Senior Investment Consultant Doug Moodie , Chief Executive Officer, Nova Scotia Pension Services Corporation Natasha Trainor , Director, Investments, University of Ottawa What Drives Our Implementation Decisions Facilitator: Oma Sharma , Client Relationship Manager Sasha Zito , Senior Director, International HR - TransUnion Robert Patzelt , Deputy Chair and Chair of Investment Committee, Workers' Compensation Board of Nova Scotia Martin Belanger , Director, Investments, Western University Improving the DC Member Experience Facilitator: Jillian Kennedy , Leader of DC Financial Wellness, Canada Jason Traetto , Senior Manager, Benefits and Wealth Programs, Rogers Communications	Library, Main Mezzanine Territories, Main Mezzanine Salon A, Convention Floor Toronto, Convention Floor

15:20-15:55	Campfire Conversations: Fireside Chats with Mercer Clients Round 2	
15:55-16:25	Networking and Coffee Break	Canadian Foyer, Convention Floor
16:25-16:45	Mastering the Elements: How to Structure an Income-Producing Portfolio Jeff Bunce , Asset Class Specialist, Fixed Income Ryan Anderson , Senior Investment Consultant	Canadian, Convention Floor
16:45-17:10	So You Want to Tilt Your Equity Portfolio Facilitator: Aisling Doherty , Senior Investment Consultant Oh Canada Patrick Graham , Asset Class Specialist, Equity Boutique It's Time for China A-Shares Kimberly Hart , Investment Consultant USA All the Way Elena Demopoulos , Investment Consultant Frontier Markets Lead the Way Victoria Goh , Asset Class Specialist, Equity Boutique Small Cap Is Where It's At Matthew Merriam , Investment Analyst Low Vol Forever Misbah Lalani , Investment Analyst Sustainability-Themed Equity Is the Future Stacy Walters , Asset Class Specialist, Equity Boutique	
17:10-17:20	Game of Later Life – Round 3 Brett Jennings , Senior Investment Consultant	
17:20-17:40	Keeping the End Goal in Mind Dave Makarchuk , Wealth Leader, Western Canada	
17:40-17:45	Final Remarks Teresa Palandra , Office Leader, Toronto	
18:00-22:00	Drinks & Offsite Dinner	Royal Ontario Museum

Friday 21 June, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
08:00-09:00	Breakfast	Ontario, Convention Floor
09:00-09:05	MC Angelita Graham , Senior DB Actuarial Consultant	Canadian, Convention Floor
09:05-09:45	The Importance of Diversity and HR Transformation Host: Kevin Hendershot , Senior Client Management and Development Consultant Jaqui Parchment , CEO, Canada Ilana Hechter , Senior HR Effectiveness Consultant	
09:45-10:15	Investing in a Time of Climate Change – Ramifications for Portfolios Max Messervy , Responsible Investment Consultant Karen Lockridge , Senior Investment Consultant	
10:15-10:35	Profiling the DC Portfolio: Investing in 2020 and Beyond Pat Leo , Senior Investment Consultant Joseph Bevilacqua , Senior Investment Consultant	
10:35-11:05	Networking and Coffee Break	Canadian Foyer, Convention Floor
11:05-11:25	To Annuitize ... or Not to Annuitize ... That Is the Question Andrew Whale , Senior DB Actuarial Consultant Hrvoje Lakota , MDDS Strategy Consultant	
11:25-11:35	Late Cycle Opportunities for Robust Portfolios Venelina Arduini , Investment Consultant	
11:35-12:15	Braving EM: Which Is the Best Approach in This Late Cycle? Moderator: Irfan Hassan , Investment Consultant 1. EM Infrastructure Michael McGowan , Asset Class Specialist, Alternatives 2. EM Debt Chris Kamykowski , Asset Class Specialist, Fixed Income 3. EM Equities Robert Vozzella , Investment Consultant	
12:15-12:25	Game of Later Life – Final Destination Brett Jennings , Senior Investment Consultant	
12:25-12:40	Bringing It All Together – Practical Application Dave Makarchuk , Wealth Leader, Western Canada	
12:40-12:45	Closing Remarks Rich Nuzum , President, Wealth	
12:45-14:00	Lunch	Ontario, Convention Floor