

investing in a
brighter future

...it's a matter of time

Mercer Global Investment Forums 2020
Washington DC | 2-3 June

Agenda



Monday June 1, 2020

Time	Topic	Location
15:30–16:30	Asset Manager Briefing Registration	
16:30–18:55	Asset Manager Briefing	
19:00–21:00	Welcome Reception & Buffet Dinner	

Tuesday June 2, 2020

Time	Topic	Location
07:30–08:45	Registration	
07:45–08:55	Breakfast	
09:00–09:10	Welcome and Opening Christine Mahoney , Wealth Leader, US	
09:10–09:30	It's a Matter of Time: Themes and Opportunities for 2020 and Beyond Deb Clarke , Global Head of Investment Research	
09:30–09:35	MC Orly Krause , Senior Investment Consultant	
09:35–09:50	Don't Give Up on Diversification Travis Pruitt , US Delegated Not-for-Profit Business Leader	
09:50–10:00	Biding Time? Eyes on the Emerging Markets and China Mark Stoner , Asset Class Specialist, Equity Boutique	
10:00–10:40	A Timely Debate: Is Modern Monetary Theory the Solution? Anthony Brown , US Director of Capital Markets Susan McDermott , US Strategic Research Director	

Time	Topic	Location
10:40–11:10	Networking and Coffee Break	
11:10–12:10	Keynote Address David Gregory , Journalist, Former Moderator NBC's Meet the Press: Political Analyst, CNN	
12:10–12:20	Gold: You're Indestructible Amish Gandhi , Senior Investment Consultant	
12:20–12:45	MMC Insights Global Risks Richard Smith-Bingham , Executive Director, Insights, Marsh & McLennan Advantage	
12:45–14:00	Lunch	
14:00–14:25	Decarbonisation in the 'Decade of Delivery' Max Messervy , Responsible Investment Consultant Nick White , Global Strategic Research Director	
14:30–15:05	BREAKOUT 1: Workshop Your Investment Beliefs Facilitators: Katie Hockenmaier , DC Segment Leader, West Region Jessica Portis , US Not-for-Profit Consulting Services Leader	
	BREAKOUT 2: Panel – Why Bother with Active Management? Facilitators: Sean Chatburn , Asset Class Specialist, Equity Boutique Chris Moore , Chief Investment Officer, Not-for-Profit	
	BREAKOUT 3: Workshop – Benchmarking Unbenchmarkable Private Assets Facilitators: Mike Molino , Senior Investment Consultant Richard Pugmire , Senior Investment Consultant	
	Breakout 4: Insurance Company Investment Trends and Outlook Facilitators: Gregory Halagan , Senior Investment Consultant Christopher Tschida , Senior Investment Consultant	
15:10–15:50	BREAKOUTS ROUND 2 – AS ABOVE	
15:50–16:20	Networking Break	

Time	Topic	Location
16:20–17:00	Fab Four: The Battle for 4% Real Return Host: Jennifer Flodin , Senior Investment Consultant Don't Fight the Future: In Tech We Trust Turner Bailey , Private Equity Specialist, Mercer Alternatives Time Heals All Wounds: Value Equity Stacy Walters , Asset Class Specialist, Equity Boutique What about Water?! Time to Tap into this Opportunity! Speaker TBC Making Time: Activist Hedge Funds Scott Zipfel , Asset Class Specialist, Diversifying Alternatives	
17:00–17:15	Day One Close Brandi Wust , Tri-State Wealth Leader	
18:30–22:00	Offsite Dinner	

Wednesday June 3, 2020

Time	Topic	Location
07:45–08:55	Breakfast	
09:00–09:15	Opening – Day 2 Rich Nuzum , President, Wealth	
09:15–09:20	MC Hugh Merkel , Senior Investment Consultant	
09:20–10:20	Guest Speaker	
10:20–10:50	Good Governance: The Key to Successful Private Markets Investing Raelan Lambert , Global Head of Private Debt, Alternatives Jim Treanor , Senior Investment Consultant	
10:50–11:20	Networking and Coffee Break	
11:20–11:55	Is it Just a Matter of Time Until Active Ownership Becomes Mainstream? Facilitator: Nicole Delahanty , Senior Investment Consultant <i>Panelists to be announced</i>	
11:55–12:25	The Science of Leadership: How Organizations Succeed Through Culture Dr. Patrick Hyland , Director of Research and Development, Mercer Sirota	
12:25–12:45	The Time Is Now: Go Forth Boldly and Shape the Future Jay Love , US Investment Consulting Leader	
12:45–14:00	Lunch	