

# AGENDA

## MERCER GLOBAL INVESTMENT FORUMS

PLOT A ROUTE TO SUCCESS IN THIS  
EXTENDED CYCLE

CHICAGO | June 13–15, 2018



### 13 JUNE, WEDNESDAY, RENAISSANCE CHICAGO DOWNTOWN

TIME	SESSION/SPEAKER(S)	LOCATION
3:45pm–4:30pm	<b>Asset Manager Session Registration</b>	3rd Floor Foyer
4:30pm–6:35pm	<b>Asset Manager Session</b>	Cloud Gate 1–4
7:00pm–10:00pm	<b>Welcome Reception and Buffet Dinner</b>	Great Street, 2nd Floor

### 14 JUNE, THURSDAY, RENAISSANCE CHICAGO DOWNTOWN

TIME	SESSION/SPEAKER(S)	LOCATION
7:30am–8:30am	<b>Breakfast</b>	Great Street and Discover
8:45am–8:55am	<b>Welcome and Opening</b> Tom Murphy, Wealth Leader, US	Grand Ballroom
8:55am–9:00am	<b>MC</b> Chris Tauber, Senior Investment Consultant	
9:00am–9:50am	<b>2018 Investment Themes and Practical Application</b> Deb Clarke, Global Head of Investment Research <b>Panel:</b> Phil Edwards, Global Director of Strategic Research Jessica Portis, Not-for-Profit Segment Leader Nick Davies, US Investment Consulting Leader	

9:50am–10:05am	<b>Mind Games 2: Plotting a Digital Odyssey — Round 1</b> Geoff Wilson, Senior Investment Consultant, Not-for-Profit Client Segment	
10:05am–10:35am	<b>Networking and Coffee Break</b>	Grand Ballroom Foyer
10:35am–11:35am	<b>Keynote Address: Happiness — What Your Mother Didn't Tell You</b> Dr. Daniel Gilbert, Professor of Psychology, Harvard University	Grand Ballroom
11:35am–11:45am	<b>Lightning Talk: Will All Stock-Pickers Be Robots?</b> Carissa Tepovich, Investment Consultant	
11:45am–12:25pm	<b>Does Our Industry Remain Fit for Purpose?</b> Rich Dell, Global Leader, Equity Boutique Jay Love, US Director of Strategic Research	
12:25pm–12:35pm	<b>Mind Games 2: Plotting a Digital Odyssey — Round 2</b> Geoff Wilson, Senior Investment Consultant, Not-for-Profit Client Segment	
12:35pm–1:50pm	<b>Lunch</b>	Great Street and Discover
1:50pm–2:20pm	<b>Stewardship in the 21st Century — Creating Sustainable Long-Term Growth</b> Alex Bernhardt, US Responsible Investment Leader Christine Bradford, Senior Investment Consultant	Grand Ballroom
2:20pm–2:30pm	<b>Lightning Talk: Social Systemic Issues — New Lenses and Blind Spots</b> Karen Lockridge, Senior Investment Consultant	
2:30pm–3:15pm	<b>BREAKOUT SESSIONS 1</b>	
	<b>Mercer Question Time: You Ask, We Answer</b> <b>Facilitator:</b> Jay Love, US Director of Strategic Research	Grand Ballroom
	<b>Panelists:</b> Paul Cavalier, Global Head, Fixed Income Boutique Liana Magner, US Delegated DC Leader Bill Muysken, Chief Investment Officer, Alternatives	
	<b>Mythbusters: Alternative Risk Premia</b> David Erhardt, Research Specialist, Hedge Fund Boutique John Jackson, Global Leader, Hedge Fund Boutique	Cloud Gate 1
	<b>DB Plans: Turning the Corner</b> Scott Dunbar, Senior Investment Consultant Chris Ebersole, Investment Consultant	Cloud Gate 3
	<b>DC Plans: Why Great Investment Portfolios Are Not Enough</b> Neil Lloyd, Head, US DC and Financial Wellness Research Miriam Tolbert, Senior Investment Consultant	Cloud Gate 5
3:15pm–3:50pm	<b>BREAKOUT SESSIONS 2 (as above)</b>	
3:50pm–4:20pm	<b>Networking and Coffee Break</b>	Grand Ballroom Foyer

4:20pm–4:30pm	<b>Lightning Talk: Exploring Shareholder Value — Private and Public Equity</b> Rohit Nerurkar, Investment Consultant	Grand Ballroom
4:30pm–5:10pm	<b>Debate: Is Inflation Ever Coming Back?</b> Anthony Brown, US Director of Strategic Research Andrew Kirton, Global Chief Investment Officer	
5:10pm–5:25pm	<b>Day 1 Closing Remarks</b> Rich Dabrowski, Senior Investment Consultant	
6:00pm–10:00pm	<b>Drinks and Offsite Dinner</b>	Theater on the Lake

## 15 JUNE, FRIDAY, RENAISSANCE CHICAGO DOWNTOWN

TIME	SESSION/SPEAKER(S)	LOCATION
8:00am–9:00am	<b>Breakfast</b>	Great Street and Discover
9:00am–9:05am	<b>MC</b> Katie Hockenmaier, Investment Consultant	Grand Ballroom
9:05am–10:05am	<b>Politics in the Age of Trump</b> Mara Liasson, Political Analyst, National Political Correspondent, NPR	
10:05am–10:30am	<b>A How-To Guide to Reducing Risks</b> Jason Blackwell, Senior Investment Consultant Shaum Shrinivas, Senior Investment Consultant	
10:30am–11:00am	<b>Networking and Coffee Break</b>	Grand Ballroom Foyer
11:00am–11:30am	<b>Mindful Leadership</b> Charlotte Thaarup, Director, The Mindfulness Clinic	Grand Ballroom
11:30am–12:00pm	<b>Hot Spots: Opportunities in Public and Private Infrastructure and Real Estate</b> Toby Buscombe, Global Leader, Infrastructure Allison Yager, Global Leader, Real Estate Boutique	
12:00pm–12:10pm	<b>Mind Games 2: Plotting a Digital Odyssey — Round 3</b> Geoff Wilson, Senior Investment Consultant, Not-for-Profit Client Segment	
12:10pm–12:25pm	<b>Plot a Route to Success in This Extended Cycle</b> Travis Pruit, US Proposition Leader, Not-for-Profit OCIO	
12:25pm–12:30pm	<b>Closing Remarks</b> Rich Nuzum, President, Wealth	
12:30pm–1:45pm	<b>Lunch</b>	Great Street and Discover

Draft agenda; subject to change without prior notice 6/7/2018.