

AGENDA

MERCER GLOBAL INVESTMENT FORUMS

PLOT A ROUTE TO SUCCESS
IN THIS EXTENDED CYCLE

MONTRÉAL | 13 November 2018



12 NOVEMBER, MONDAY

TIME	SESSION/SPEAKER(S)	LOCATION
12:00–17:00	Welcome and Registration	Main Lobby
15:15–16:00	Asset Manager Session Registration	
16:00–18:15	Asset Manager Session	
18:30–21:30	Offsite Dinner <i>Pre-Dinner address:</i> Jean-Philippe Provost , <i>Wealth Leader, Canada</i>	The Windsor Ballroom

Offsite dinner will commence at 18:30. Walking directions and assistance will be available in the lobby of the Fairmont hotel.

13 NOVEMBER, TUESDAY

TIME	SESSION/SPEAKER(S)	LOCATION
07:30–08:30	Breakfast	Av. Laurier/Av. Viger Convention Level
08:45–08:55	Welcome and Opening Jean-Philippe Provost , <i>Wealth Leader, Canada</i>	Place du Canada, Convention Floor
08:55–09:00	MC Lori Park , <i>Wealth and Market Leader, Atlantic Canada</i>	

09:00–09:50	Investment Themes and Practical Application Deb Clarke , Global Head of Investment Research Panel: Jay Love , US Director of Strategic Research Jillian Kennedy , Leader of DC and Financial Wellness, Canada Dave Makarchuk , Investment Sales and Strategy Leader, Canada	
09:50–10:10	Stewardship in the 21st Century – Creating Sustainable Long-Term Growth Max Messervy , Senior Investment Consultant Karen Lockridge , Senior Investment Consultant	
10:10–10:25	Mind Games 2.0 – Round 1 Jean-Francois Fontaine , Investment Consultant	
10:25–10:55	Networking and Coffee Break	Square Dorchester, Convention Floor
10:55–11:05	Lightning Talk: Mythbusters – Alternative Risk Premia Jonathan Croft , Senior Investment Consultant	Place du Canada, Convention Floor
11:05–12:05	Keynote Address The Case for Audacious Leadering Nancy Giordano , Strategic Futurist	
12:05–12:15	Mind Games 2.0 – Round 2 Jean-Francois Fontaine , Investment Consultant	
12:15–13:30	Lunch	Av. Laurier/Av. Viger Convention Level
13:30–14:10	Meeting the Needs of 21st Century Investors Rich Dell , Global Leader, Equity Boutique Samantha Cleyn , Senior Investment Consultant Stephanie Mariamo , Senior Investment Consultant	Place du Canada, Convention Floor
14:10–14:20	Lightning Talk: What You Can't See Can Still Hurt You Todd Saulnier , Senior Investment Consultant	
14:20–15:20	An 'Alternative' Showdown Host: Aisling Doherty , Senior Investment Consultant <ol style="list-style-type: none"> 1. Alternative Fixed Income Jeff Bunce, Research Specialist 2. Private Equity Sid Vittal, Asset Class Specialist, Mercer Private Markets 3. Real Assets Michael McGowan, Asset Class Specialist, Mercer Private Markets 4. Liquid Alternatives Kishen Ganatra, European Director, Strategic Research 	
15:20–15:50	Networking and Coffee Break	Square Dorchester, Convention Floor

15:50–16:10	Mind the Gap: Addressing the Retirement Challenge Dominique Lavoie , Investment Consultant Julie Dubois , Senior Investment Consultant	Place du Canada, Convention Floor
16:10–16:35	What’s Next for Canadian Pension Fiduciaries? Liability-Driven Investing Hrvoje Lakota , MDDS Strategy Consultant Dario Morrone , Investment Consultant	
16:35–17:05	Debate: Is Inflation Ever Coming Back? The Implications for Strategic Asset Allocation Andrew Kirton , Global Chief Investment Officer David Zanutto , Market Business Segment Leader	
17:05–17:20	Plot a Route to Success in This Extended Cycle Gilles Lavoie , Senior Investment Consultant	
17:20–17:30	Mind Games 2.0 – Round 3 Jean-Francois Fontaine , Investment Consultant	
17:30–17:40	Closing Remarks Rich Nuzum , President, Wealth	
17:45–19:00	Drinks	Agora, Lobby Level