



## AGENDA Wednesday, September 28<sup>th</sup>

- 1:30 – 4:30      **COMPLIMENTARY GOLF – TURTLE HILL GOLF CLUB AT FAIRMONT SOUTHAMPTON**  
*Don't miss out as space is limited*  
*Sponsored by: Ernst & Young Ltd.*
- Winner of Golf Digest's "Best Places to Play Golf" this on site Bermuda golf course features 18 challenging par 3 holes, most with stunning views of the Atlantic Ocean. With lush sub-tropical surroundings, dramatic elevation changes, and strong coastal winds, this challenging golf course is designed to take your short game to new heights.
- 5:00 – 6:00      **CONFERENCE REGISTRATION – GREAT SOUND LAWN**
- 6:00 – 7:00      **OPENING RECEPTION AND NETWORKING COCKTAIL – GREAT SOUND LAWN**  
Conference kicks off on the beautiful grounds of the Fairmont Southampton resort.  
*Sponsored by: Bermuda Business Development Agency & Fairmont Southampton*

## Thursday, September 29<sup>th</sup>

- 7:00              **BREAKFAST – Sponsored by: Conyers Dill & Pearman Limited**
- 8:00 – 8:05      **OFFICIAL CONFERENCE WELCOME**  
*Tony Sanfelice, President and CEO, Radius Financial Education*
- 8:05– 8:15      **MASTER OF CEREMONY**  
*Pat Bolland, Former BNN Anchor, Media Consultant*
- 8:15 – 8:30      **OFFICIAL WELCOME TO BERMUDA**  
*The Hon. Michael H. Dunkley, J.P, M.P, Premier of Bermuda*
- 8:30 – 9:00      **A WORLD APART: SEPARATING FACT FROM FICTION POST-PANAMA PAPERS**  
*Ross Webber, CEO, The Bermuda Business Development Agency (BDA)*
- The need for top-tier jurisdictions to differentiate themselves from less scrupulous domiciles has never been more critical. How blue-chip international financial centres need to demonstrate their global value, rise to the challenge of ever-increasing regulation – and combat the current tsunami of misinformation.
- 9:00 – 9:40      **KEYNOTE SPEAKER:**  
**GLOBAL ECONOMIC OUTLOOK: BEWARE OF AFTERSHOCKS**  
*Lawrence McDonald, Managing Director, Head of Global Macro Strategy, ACG Analytics & Creator of The Bear Traps Report ([www.thebeartrapsreport.com](http://www.thebeartrapsreport.com))*
- The global economy continues to be buffeted by the financial shocks and uncertainty since last summer, when China supplanted the Fed as the main global economic focal point. If we layer on the ever-increasing geo-political risks with the Middle East as the focal point, the aftershocks continue to reverberate globally. Mr. McDonald will provide a wide-ranging update and outlook for markets and economies globally, across emerging markets and developed markets, and will discuss central bank easing / rate normalization and expectation for stock and bond markets.



- 9:40 – 10:20 **PANEL: FAMILY OFFICE INVESTING, GOVERNANCE AND THE NEXT GENERATION**  
*Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant*  
**Jerry Davis**, CIO, Piedmont Family Offices  
**Pierre duPont**, Partner, HPM Partners LLC  
**Jon Najarian**, Co-Founder, NajarianFamilyOffice
- What does make a successful family office in the long run, and why do many fail?
  - Exploiting Alternative Investment opportunities and avoiding the “bets”
  - Family Governance the asset that preserves the family legacy
  - Risk management and the relevant risk categories
  - Philanthropy & Investing to align the family members
- 10:20 – 10:40 **NETWORKING BREAK – Sponsored by: Deloitte Ltd.**
- 10:40 – 11:20 **PANEL: ASSET MANAGERS: RISKS AND OPPORTUNITIES OF INVESTING IN A LOW RETURN ENVIRONMENT**  
*Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant*  
**Craig Bodenstab**, Director, Orbis Investments  
**James Thorne**, Ph.D., Chief Capital Market Strategist & Senior Portfolio Manager, Caldwell Investment Management Ltd.  
**John Wilson**, Chief Executive Officer, Co-Chief Investment Officer, Senior Portfolio Manager, Sprott Asset Management
- Earning solid risk-adjusted returns continues to be one of the most pressing concerns for Institutional Investors. The demand for stable, long-term assets is much greater than the supply in developed markets, forcing investors to look more and more to developing markets. But with the turmoil in the oil and currency markets and its related impact on developing market economies, managing currency risk in emerging market investing may become more critical.
- 11:20 – 12:00 **PANEL: OFFSHORE FUND STRUCTURING, FORMATION AND OPERATIONS – BERMUDA CASE STUDY**  
*Moderated by: Jessel Mendes, Partner, Financial Services, EY*  
**Elizabeth Denman**, Director, Corporate Office Bermuda, Conyers Dill & Pearman  
**Sean Moran**, Business Development Manager, Bermuda Business Development Agency  
**Melissa Morton**, Assistant Director - Licensing & Authorisations, Bermuda Monetary Authority
- Bermuda’s Asset Management Landscape – From leadership to revival to growth
  - Changes that have taken place – clear vision, engagement, systemic issues, welcoming, sales vs marketing...we can all weigh in with examples
  - Advantages of doing business in Bermuda – talent, regulation, access to capital, tax, proximity, stability
  - Product offerings
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- 12:00 – 1:10 **NETWORKING LUNCH – Sponsored by: Ernst & Young Ltd.**
- 12:30 – 1:00 **LUNCH SESSION: PRIVATE DEBT INVESTING: OPPORTUNITIES AND RISKS**  
**David Dipaolo**, Managing Director & Investment Committee Member, Star Mountain Capital

In the current interest rate environment, return expectations on fixed income assets are low and risk



asymmetry is acute, pushing investors to seek alternative sources of yield to meet return expectations via credit and liquidity risk. Post the financial crisis, global banks have retrenched from traditional debt markets due to increased regulatory capital changes. Less liquid debt instruments and strategies are filling the gap for much needed corporate financing through non-traditional means, particularly in European markets.

1:10 – 2:00

**DEBATE: SILICON VALLEY...BUBBLE OR BUYING OPPORTUNITY?**

Speaker of the House: **Hugh Innes**, Managing Director, Logan Wealth Management  
**Michael Murphy**, Founder and CEO, Rosecliff Ventures  
**Jon Najarian**, Co-Founder, NajarianFamilyOffice.

2:00 – 2:40

**PANEL: FUND ADMINISTRATION AS A STRATEGIC OUTSOURCING SOLUTION FOR ASSET MANAGERS**

Moderated by: **Pat Bolland**, Former BNN Anchor, Media Consultant  
**Louis Almerini**, CPA and FINOP, CFO Financial Partners LLC  
**Mark Baumgartner**, Partner, Deloitte Ltd., Bermuda  
**Ken Mahadeo**, Managing Director - Bermuda, Apex Fund Services

- Effective fund set up, launch and administration
- Managing compliance, regulation & risk in fund servicing
- The process of trade Capture, record keeping & reconciliation
- Role of fund operations and mitigating operational risks
- Risk relationships: client/counterparty/bank

2:40 – 3:10

**WHY REAL ESTATE, WHY NOW, WHY GREEN?**

**Douglas Lawrence**, Managing Principal, 5 Stone Green Capital LLC

3:10 – 3:30

**NETWORKING TEA BREAK – Sponsored by: Apex Fund Services Ltd.**

3:30 – 4:10

**PANEL: COMPLIANCE AND GOVERNANCE ISSUES FACING OFFSHORE FUNDS**

Moderated by: **Pat Bolland**, Former BNN Anchor, Media Consultant  
**Craig Bridgewater**, Managing Director, KPMG Bermuda  
**Sarah Demerling**, Client Director, Estera  
**Neil Glass**, Owner, WW Management  
**Henry Komansky**, Consultant, Oyster Consulting

Independent fund directors based in Bermuda discuss offshore fund issues from a compliance and governance standpoint.

These Bermuda-based directors are directors of funds from a number of different offshore jurisdictions, including Cayman, BVI and Bermuda.

4:10 – 4:40

**PANEL: INTRODUCTION TO INSURANCE LINKED SECURITIES (ILS)**

Moderated by: **Andre Perez**, CEO, Horseshoe Group  
**Jennifer Eve**, Senior Associate, Appleby (Bermuda) Limited  
**Richard Lowther**, Chief Operating Officer, Hiscox Insurance Linked Strategies  
**Greg Wojciechowski**, President & CEO, The Bermuda Stock Exchange

ILS strategies have been growing in popularity. Some of the most commonly used structures will be discussed in this session.



4:40 – 5:30 **KEYNOTE PRESENTATION**  
**BLOCKCHAIN TECHNOLOGY – HOW WILL IT AFFECT INVESTMENT MANAGEMENT?**  
*William Mougayar, Author of The Business Blockchain*

Many asset managers, retail advisors, banks and custodians are recognizing that the technology behind bitcoin has limitless potential for use in institutional investing, from interest-rate swaps to settlements and back-office functions. Product managers and strategists are creating new applications for the technology, while software developers are working overtime to turn these ideas into reality. The immediate applications related to institutional investing include trade finance, securities finance, over-the-counter derivatives, interest-rate swaps, fund administration, and back- and middle-office functions. How should institutional investors and retail advisors start thinking about blockchain technology (from both a functional standpoint and as a sector to invest in)? How will the applications of this technology affect the institutional investment landscape generally and portfolio management specifically?

6:00 – 8:30 **NETWORKING: BARBEQUE AND BEACH PARTY**  
**Sponsored by: Bermuda Business Development Agency & Radius Financial Education**  
Enjoy the beautiful surroundings of a private beach club situated on one of Bermuda's finest beaches, a secluded private cove with impossibly pink sand.

## Friday, September 30<sup>th</sup>

7:00 – 8:00 **BREAKFAST – Sponsored by: Appleby (Bermuda) Limited**

8:00 – 8:10 **SECOND DAY RECAP**  
*Pat Bolland, Former BNN Anchor, Media Consultant*

8:10 – 8:20 **AIMA UPDATE**  
*Craig Bridgewater, Chair, AIMA Bermuda*

8:20 – 9:00 **PANEL: GLOBAL AND BERMUDA REGULATORY UPDATE**  
*Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant*  
*Federico Candiolo, Senior Counsel, ASW Law Limited*  
*Ifor Hughes, Assistant Director of Policy, Bermuda Monetary Authority*  
*Sally Penrose, Senior Associate, Appleby Bermuda*  
*Hank Sanchez, Managing Director, Oyster Consulting*

Latest regulatory, compliance and valuation updates affecting the fund industry from the US and Bermuda perspective.

9:00 – 9:40 **GLOBAL, U.S. AND CANADIAN ECONOMIC OUTLOOK**  
*Paul Domjan, CEO, 4CAST-RGE (formerly Roubini Global Economics)*

The global economy continues to be buffeted by the financial shocks and uncertainty since last summer, when China supplanted the Fed as the main global economic focal point. If we layer on the Brexit situation and the ever-increasing geopolitical risks with the Middle East as the focal point, the aftershocks continue to reverberate globally. A wide-ranging update and outlook for markets and economies globally, across emerging markets and developed markets will be discussed as well as central bank easing, / rate normalization and expectation for stock and bond markets. Could negative interest rates go viral +change the world?



9:40 – 10:40 **PANEL: BLOCKCHAIN TECHNOLOGY, CYBERSECURITY, INTERNET OF THINGS, BIG DATA - THE BRAVE NEW WORLD IS HERE**

*Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant*

**Christopher Burniske**, Blockchain Products Lead, ARK Invest

**Geoffrey King**, National Director, Financial Services Industry Digitization, Cisco Systems Canada

**Stafford Lowe**, Managing Director, R3

**Chris Maiato**, Principal, Advisory Services, Ernst & Young Ltd

**Mike Majors**, Managing Partner, Data Point Capital

Technology is moving so quickly, and in so many directions, that it becomes challenging to pay attention – yet blockchain technology advancement continues to drive economic growth and, in many cases, unleash disruptive change. Huge advances are being made on many fronts – automation of knowledge, the internet of Things (IoT), advanced robotics, next generation genomics, energy storage, to name but a few. There will continue to be ongoing disruptions to established norms, and there will be broad societal challenges – but also immense opportunities. Advances will transform life, business and the global economy.

10:40 – 11:00 **NETWORKING BREAK – Sponsored by: ASW Law Limited**

11:00 – 11:50 **PANEL: ETFS: A DISRUPTION TO THE ACTIVE MANAGEMENT SPACE**

*Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant*

**Bobby Eng**, Vice President, State Street Global Advisors, Ltd. & Head, SPDR ETF Business Development for Canada

**Deborah Fuhr**, Managing Partner & Co-founder, ETFGI

**Tom Goodwin**, Senior Director of Research, FTSE Russell

**Justin Oliver**, Vice President, Exchange Traded Funds, BMO Global Asset Management

With the high growth of ETFs encroaching on the turf of active hedge fund managers and the entrance of the "robo-advisors" which also rely on low cost ETFs it is changing the portfolio landscape for investors.

Is there a Fund Uber coming?

11:50 – 12:50 **KEYNOTE PRESENTATION:  
SECRETS OF THE SIMPSONS WITH MIKE REISS**

Mike Reiss won four Emmys and a Peabody Award during his 25 years writing for The Simpsons. In this hilarious presentation, illustrated with rare film clips, he shares secrets, scandals, and anecdotes about his dealings with celebrity guests, network censors, and even the Pope (he loves the show!). Reiss will also give practical advice from the show's history, discussing the creativity and teamwork that made The Simpsons the longest running and most profitable show in history

\*\*\*\* CLOSE OF CONFERENCE \*\*\*\*