



AGENDA

Wednesday, October 11th

- 2:00 – 5:00 **GOLF – TURTLE HILL GOLF CLUB AT FAIRMONT SOUTHAMPTON**
Don't miss out as space is limited
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**
- 6:00 – 7:30 **OPENING RECEPTION, NETWORKING COCKTAIL & SCOTCH TASTING**
Conference kicks off with cocktails at the Fairmont Southampton resort. Join us for cocktails and also join scotch master Dr. Bob Lee as we taste and discuss the subtleties of the bottlings.
Sponsored by: Bermuda Business Development Agency (BDA)

Thursday, October 12th

- 7:30 – 9:00 **BREAKFAST**
Sponsored by: Appleby
- 9:00 – 9:10 **MASTER OF CEREMONY**
Pat Bolland, Former BNN Anchor, Media Consultant
- 9:10 – 9:25 **OFFICIAL WELCOME TO BERMUDA**
The Hon. Jamahl S. Simmons, JP, MP, Minister of Economic Development and Tourism
- 9:25 – 9:40 **BERMUDA IS INNOVATION, QUALITY AND STABILITY**
Sean Moran, Head of Business Development, Bermuda Business Development Agency (BDA)

Hear first-hand why Bermuda has truly opened the doors to international business. From the island's global reinsurance center, to its long-established trust and private client sector, its ever increasing number of family offices, its thriving funds industry and more..
- 9:40 – 10:40 **THE CHALLENGES OF FORMULATING A GLOBAL ECONOMIC OUTLOOK IN THE AGE OF VOLATILE POLITICS & POLICY**
Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant
Finn Poschman, President & CEO, Atlantic Provinces Economic Council
Kevin Harris, Director, North America, Continuum Economics

A wide-ranging discussion of issues facing the Global, US, UK and Canadian Economies in a fast changing world of politics and policy. Topics will range from the current state of the Global economy, the Trump factor in the U.S. economy, Brexit in the UK economy, the Canadian housing market, NAFTA and the relative roles of monetary and fiscal policy.
- 10:40 – 11:00 **NETWORKING BREAK**
Sponsored by: KPMG



- 11:00 – 11:40 **INSIGHTS ON MULTI-GENERATIONAL FAMILY WEALTH**
Pierre duPont, HPM Partners LLC
- How to project what you have built beyond your children
 - Your wealth is far more than money
 - Functions for a *family office*, whether real or virtual
- 11:40 – 12:20 **PANEL: FUND STRUCTURING, COMPLIANCE AND GOVERNANCE ISSUES FACING OFFSHORE FUNDS**
Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant
Tonesan Amissah, Partner, Funds and Investment Services, Appleby
Craig Bridgewater, Head of Asset Management, KPMG Bermuda
Neil Glass, Owner, WW Management
Alison Morrison, Managing Director, Oyster Consulting
- Factors to consider in setting up an offshore structure
 - Types of legal structures to suit strategy
 - Regulatory and ongoing compliance issues
 - Operational considerations (costs, legal availability of service providers, expertise, fund reporting)
 - Independent fund directorship
- 12:20 – 1:20 **LUNCH**
Sponsored by: KilSol
- 12:40 – 1:00 **LUNCH SESSION**
HACKING, ESPIONAGE & MONEY THEFT
Vitali Martiniouk, Security Consultant, KilSol
- Analysis of recent famous scandals, how it can affect you personally & ways to protect yourself.
- 1:20 – 2:10 **DEBATE: ARTIFICIAL INTELLIGENCE WILL REPLACE STOCK PICKING PORTFOLIO MANAGERS SOONER THAN YOU THINK?**
Moderated by: Zachary Schwartz, President, ZSC Inc.
Michael P. Murphy, Founder and CEO, Rosecliff Ventures
Jon Najarian, Co-Founder, NajarianFamilyOffice.& CNBC Halftime Report
- Fast Money Halftime report trader & Investor Jon Najarian “DRJ” will argue the merits of Stock Picking over Automatiion and go up against Rosecliff Ventures and Tech Investor Michael Murphy “Murph”.
- 2:10 – 2:40 **PANEL: GLOBAL AND BERMUDA REGULATORY UPDATE**
Moderated by: Pat Bolland, Former BNN Anchor, Media Consultant
Brian Desmond, Chief Strategy Officer, Executive Vice President & Head of Fund Services, Horseshoe Group
Stephanie P. Sanderson, Partner, Corporate, BeesMont Law Limited
James Dockeray, Tax Partner, Deloitte Ltd.
Jarion Richardson, Founding Member & Managing Principal, Certainty. Ltd.
- What are some of the biggest changes recently in Bermuda from an international regulatory and transparency perspective?
 - How does Bermuda keep competitive when there are all of these international pressures to be more transparent and implement more rules and regulations in the jurisdiction?
 - What should Investment Managers and Service Providers be doing in light of the increased regulatory pressures?
 - What regulatory changes are on the horizon in Bermuda?



2:40 – 3:00

NETWORKING BREAK

Sponsored by: Deloitte

3:00 – 3:50

PANEL: FAMILY OFFICE INVESTING, OFFSHORE TRUSTS & PRIVATE CLIENT SECTOR

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

Jonathan Dunlop, Vice President, Trust Services, Butterfield Trust, Bermuda

Pierre duPont, Partner, HPM Partners LLC

Randall Krebs, Director, Harbour International Trust Company Limited

Jon Najarian, Co-Founder, NajarianFamilyOffice

Family Office investors will be joined by two of Bermuda's Offshore Trust and Private Client experts to discuss how it's long-established Trust and Private client sector can provide solutions.

3:50 – 4:40

ATHLETES PANEL: MONETIZING YOUR BRAND AND FINANCIAL EXPERTISE

Moderated by: Charles D. Smith, Chairman & CEO, LifeStyle Service Group

Bobby Brown, Institutional Business Development, Rockefeller & Co., Inc.

Charles Way, Head of Player Engagement Dept. NFL & former NFL

How former professional athletes maximize the inherent brand value coupled with their expertise to build mutually beneficial relationships.

6:00 – 8:30

NETWORKING: BARBEQUE BEACH PARTY / MEET AND GREET WORLD CHAMPIONS LLC

Sponsored by: 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. Great entertainment and also meet the World Champions LLC.

JAMES TONEY "Lights Out"

CHRIS BYRD "Rapid Fire"

RAY MERCER "Merciless"

RIDDICK BOWE "Big Daddy"

LAMON BREWSTER "Relentless"

Friday, October 13th

7:30 – 8:30

BREAKFAST

Sponsored by: State Street Global Advisors

8:30 – 8:40

SECOND DAY RECAP

Pat Bolland, Former BNN Anchor, Media Consultant

8:40 – 9:30

THE U.S. AND CANADIAN ENERGY SECTOR – CHANGING POLICIES, RISKS AND OPPORTUNITIES

F.L. (Ted) Morton, Senior Fellow, School of Public Policy, University of Calgary

Former Alberta Minister of Energy and Minister of Finance

The oil and gas industry is uniquely important to the Canadian economy, accounting for over 20% percent of Canada's total net exports. New governments in Alberta and Canada in 2015 and in the US in 2017 mean new policies affecting Canada's energy sector. This session will address the risks and opportunities of these policy changes, including

- Ottawa's approval of the Trans-Mountain pipeline, Enbridge Line 3 and rejection of Northern Gateway
- Canadian crude oil tanker moratorium off BC north coast
- Prospects for the Canada East pipeline project
- Diverging Canadian Climate-change policies: carbon taxes versus cap-and-trade
- Prospects for US approval of the Keystone pipeline
- Changing US policies on fracking, drilling on federal lands and climate change, and their impact on Canada



9:30 – 10:20

PANEL: BLOCKCHAIN TECHNOLOGY, CYBERSECURITY, INTERNET OF THINGS, BIG DATA - THE BRAVE NEW WORLD IS HERE

Moderated by: **Pat Bolland**, Former BNN Anchor, Media Consultant
Kirill Gourov, Portfolio Manager & Head of Research, Full Node Capital
Stafford Lowe, Chief Administrative Officer, DrumG Financial Technologies
Michael P. Murphy, Founder and CEO, Rosecliff Ventures
Steven Rees Davies, Partner, Corporate, Appleby

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.

10:20 – 10:50

PANEL: DEVELOPMENTS IN THE INSURANCE LINKED SECURITIES (ILS) INDUSTRY

Moderated by: **Zachary Schwartz**, President, ZSC Inc.
Richard Lowther, Partner & Chief Operating Officer, Hiscox Re-Insurance Linked Strategies
Brenton Slade, Chief Operating Officer, Horseshoe Group

Panel will discuss the global ILS market both from a risk management tool and as a diversified asset class for investors. How a purpose built platform such as Bermuda can create a Silicon Valley environment and innovation. Canadian exposure through ILS vehicles as a growth opportunity.

10:50 – 11:10

NETWORKING BREAK

Sponsored by: CIFP

11:10 – 11:40

ETFs: DISRUPTION OF THE TRADITIONAL ACTIVE MANAGEMENT SPACE

Bobby Eng, Vice President, Head of SPDR ETF Business Development – Canada, State Street Global Advisors

The use of ETFs by institutional investors in Canada and elsewhere to achieve strategic portfolio management goals continues to grow significantly. While ETFs were historically used as tools for tactical portfolio adjustments, they are now also being used to achieve passive exposures in the 'core' components of core/satellite portfolio structures. Moreover, the highest ETF growth segment are ETFs that incorporate active strategies, encroaching on the turf of active asset managers. Our panel will provide an update from the discussion at last year's NID, with a focus on major new developments, and a 'deeper dive' into areas such as fixed income, equity, smart beta and other factor ETFs, risk reduction and trading.

11:40 – 12:30

FEATURED KEYNOTE PRESENTATION:

Darryl Strawberry, Co-Founder, Darryl Strawberry Recovery Center

Darryl Strawberry is described as a legend by many who have been dazzled by the dynamics of his game, the power he possessed at the plate and the story of redemption that continues to bring hope to so many lives. He has earned the legendary nicknames and phrases of one of the most feared homerun hitters in the game of baseball, Straw's Sweet Swing, Strawberry's Field Forever and The Legendary Straw Man!

**** close of conference presentations ****