

## 5th Annual Funds Congress Agenda

QEII Conference Centre, Broad Sanctuary, Westminster, London SW1P 3EE

10 February 2016

**08:15** Registration Opens

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**09:00** PART I: The Commercial and Investor Outlook

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### Introduction

Peter Astleford, Partner, Dechert

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**09:10** Industry Keynote

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Emmanuel Roman, CEO, Man Group

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**09:30** Investor Trends and Resulting Product Development Priorities (all asset classes)

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Business leaders and investors will discuss structures and strategies that will raise assets in 2016.

- Paul Freeman, Director, BlackRock European Funds - *Moderator*
  - Mike Champion, Head of Product Development, Schroder Investment Management
  - Jeremy Soutter, Global Head of Product Development and Management, Standard Life Investments
  - Gad Amar, Head of EMEA Strategic Product Management, BlackRock
  - John Donohoe, CEO, Carne Group
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**10:10** Innovation in Distribution and Investor Access

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What effects is technology having on distribution, cost/margins and people?

- Peter Smith, Head of Strategic Policy Development, TISA UK - *Moderator*
  - Phil Goffin, Director of Innovation, Funds ExCo, International Financial Data Services
  - Gerard Joyce, CTO, CalQRisk
  - Charles McCready, Programme Director, TSIP and TISA
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**10:50** Coffee Break

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**11:20** The Rise and Rise of Debt Funds

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Leading private debt managers will discuss this growing market place including the opportunities driven by regulatory changes.

- Gus Black, Partner, Dechert LLP - *Moderator*
  - Ludo Bammens, Managing Director, Head of EMEA Corporate Affairs, KKR
  - Thomas Duetoft, Head of Origination, Pemberton
  - Alexander Marshall, Partner and General Counsel, Generation Investment Management
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**12:00** China: The Global Impact

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What is actually happening in the Chinese economy? What are the future opportunities and threats for investors and asset managers?

- Steve Bernat, CEO, Carne Group Luxembourg - *Moderator*
  - Peng Choy, Vice Chairman, Harvest Global Investments
  - Simon Derrick, Global Head of Asset Manager Coverage, HSBC
  - Dr. Arnab Banerji, former adviser to Tony Blair on China
  - Dr. Gian Luigi Costanzo, Senior Business and Financial Adviser, China Universal Asset Management
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**12:40** Networking Lunch

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Lunchtime "Out of the Box" Workshop

Sean Weafer

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### PART II: The Regulatory Outlook

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#### 14:00 Regulatory Keynote

Gareth Murphy, CBI

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#### 14:20 European Regulation: What Will Affect You in 2016?

Senior regulators from the FCA, CSSF, CBI, JFSC and MFSA will discuss regulatory priorities for 2016 including: AIFMD review, Capital Markets Union, new products and structures and enforcement priorities.

- Andrew Crain, MD and Global Head of Regulatory, Engagement and Development, BlackRock - *Moderator*
  - Esther Wandel, FCA
  - Jean Marc Goy, CSSF
  - Danny Lawlor, CBI
  - Mike Jones, JFSC
  - Joseph Agius, MFSA
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#### 15:10 Dealing with USA and Global Regulatory Challenges

Senior former regulators will share insight into dealing with the current regulatory priorities, including a look at recent funds industry enforcement in the U.S. and how it affects European asset managers.

- Karen Anderberg, Partner, Dechert
  - Giles Swan, Director of Global Funds Policy, ICI Global (former technical specialist, FSA)
  - David Vaughan, Partner, Dechert, (former Senior Private Fund Policy Adviser to the SEC)
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#### 15:45 Coffee Break

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### PART III: The Political Outlook

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#### 16:15 BEPS: Major Tax Changes Ahead

What is now clear as regards fund structures? What is still to be developed? The panel will cover timetable, implementation and practical guidance.

- Mark Stapleton, Partner, Dechert LLP - *Moderator*
  - Gavin Bullock, Partner, Investment Management Tax, Deloitte
  - Sam Morgan, Alternative Funds Tax, BlackRock
  - Edward Turner, Head of Tax Product, HSBC Securities Services
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#### 16:45 Brexit – The Impact on Financial Services

A panel of senior figures close to the process will discuss likely timing and impact. How can the uncertainty be managed and how would the financial services sector interact with Europe post-Brexit?

- Theo Moore, Head of Financial Services, APCO Worldwide - *Moderator*
  - Sir Graham Watson, Member, European Economic and Social Committee
  - Hon. Jacob Rees-Mogg MP, Member of Parliament for North East Somerset
  - Tim Hames, Director General, BVCA
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#### 17:35 Closing remarks

- John Donohoe, CEO, Carne
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#### 17:45 Drinks Reception and Networking

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