



INVESTMENT
MANAGEMENT FORUM

16 - 17 NOVEMBER 2016
SQUARE BRUSSELS
MEETING CENTRE

EFAMA INVESTMENT MANAGEMENT FORUM 2016

The European asset management industry:

Supporting growth | Adapting to the unexpected | Attracting international investors

16-17 November 2016

Brussels

Conference Venue: The Square Brussels Meeting Centre

Programme

DAY 1 | 16 NOVEMBER | THE EU SCENE

08:15 - 09:00	Registration & Coffee
09:00 - 09:20	Keynote address: Olivier Guersent, Director General, DG FISMA, European Commission
09:20 - 09:40	A growing role of the European asset management industry in managing saving and strengthening growth in Europe Alexander Schindler, President of EFAMA
09:40 - 10:15	Keynote Address: ESMA viewpoint- Issues & Priorities for 2017 Steven Maijoor, Chair of ESMA
10:15 - 10:45	Keynote Address: Megan Butler, Director of Supervision - Investment, Wholesale and Specialists, Financial Conduct Authority (FCA)
10:45 - 11:30	Coffee Break & Networking Opportunities
11:30 - 12:30	An ambitious agenda for investors (UCITS, PRIIPs, AIFMD, ...) - all about investor protection A panel moderated by Dr. Armin Kammel, VOEIG, with: <ul style="list-style-type: none"> • Rudolf Apenbrink, CEO, Asset Management EMEA, HSBC • Sven Gentner, Head of Unit, Asset Management, DG FISMA, European Commission • Massimo Greco, Head of European Funds, J.P. Morgan Asset Management • Guillaume Prache, Managing Director, Better Finance
12:30 - 14:00	Lunch
14:00 - 14:50	Distribution in a digital era: technology drivers for the asset management industry A panel moderated by Camille Thommes, Director General, ALFI with: <ul style="list-style-type: none"> • Tom Brown, Partner, Global Head of Investment Management, EMEA, KPMG • Franck Guiader, Head of FinTech, Innovation and Competitiveness, Autorité des Marchés Financiers (AMF) • Graham Kellen, Chief Digital Officer & Global Head of Distribution Technology, Schroders • Jaime Pérez Maura, Director, Business Development, Allfunds Bank • Martin Bailey, Head of Unit, DG Connect, European Commission (<i>invited</i>)
14:50 - 15:40	The future of the PEPP A panel moderated by Philip Warland, Senior Public Policy Adviser, Fidelity International, with: <ul style="list-style-type: none"> • Andrea Beltratti, Chairman, Eurizon Capital • Nathalie Berger, Head of Unit, DG FISMA, Unit Insurance and Pensions, European Commission • Pierre Bollon, Director General, AFG • Christian Lemaire, Global Head of Retirement Solutions, Amundi • Richard Withers, Senior Compliance Manager, Vanguard
15:40 - 16:30	Tea Break & Networking Opportunities

16:30 - 17:20	<p>The potential effects of Brexit on the European asset management industry A panel moderated by William Nott, Vice President of EFAMA, with:</p> <ul style="list-style-type: none"> • Chris Cummings, Chief Executive, The Investment Association • Sylvie Goulard MEP • Jeffrey Tessler, Member of the Executive Committee, Deutsche Börse Group • David Wright, Chairman of Eurofi • Qiumei Yang, CEO, ICI Global Asia Pacific
---------------	---

17:30	Close of Day 1
-------	----------------

19:00	Reception & Gala Dinner
-------	-------------------------

DAY 2 | 17 NOVEMBER | THE GLOBAL SCENE

08:15 - 08:50	Registration & Coffee
---------------	-----------------------

08:50 - 09:10	<p>Opening of Day 2 Peter De Proft, Director General of EFAMA</p>
---------------	---

09:10 - 10:30	<p>An IOSCO view: Introduction by Jean-Paul Servais, Vice Chairman of IOSCO & Chairman of Belgium FSMA Global debates: views on the systemic importance of asset managers; fund and market liquidity. Where do we stand? A panel moderated by David Wright, Chairman of Eurofi, with:</p> <ul style="list-style-type: none"> • Niall Bohan, Head of Unit, Capital Markets Union, DG FISMA, European Commission • Nicolas Calcoen, Chief Financial Officer, Amundi • Joanna Cound, Managing Director, Public Policy, EMEA, Blackrock • Yasushi Shiina, Member of the Secretariat, Financial Stability Board (FSB)
---------------	--

10:30 - 11:00	Coffee Break & Networking Opportunities
---------------	---

11:00 - 12:15	<p>The CEOs view: what is on the agenda for 2017? - <i>including views on market issues such as investment strategies in a low interest environment</i> A CEO Round Table moderated by Thomas Richter, Chief Executive Officer, BVI, with:</p> <ul style="list-style-type: none"> • Oliver Bilal, Head of EMEA, UBS Asset Management (UK) • Peter Branner, CEO, SEB Asset Management • Roderick Munsters, Global CEO Asset Management, Edmond de Rothschild Asset Management • Joseph Pinto, Global Chief Operating Officer, AXA Investment Management • Michael Ruediger, CEO, DekaBank
---------------	---

12:15 - 12:30	<p>Conclusions & Closing of the Conference Alexander Schindler, President of EFAMA</p>
---------------	--

12:30 - 13:30	Lunch
---------------	-------

13:45 - 15:00

Workshop hosted by Dechert LLP:

Update on U.S. regulation of funds and asset managers: Implications for Europe

During their annual U.S. regulatory update, Dechert lawyers will discuss the latest developments from the U.S. Securities and Exchange Commission, the other Volcker Agencies, and the Financial Stability Oversight Council affecting funds and asset managers, and the potential implications for European asset managers. Specific topics will include:

1. Report on the status of the SEC's rule proposals relating to:

- enhanced data reporting for funds and advisers;
- liquidity risk management programs for mutual funds;
- limitations on mutual fund leverage and derivatives; and
- business continuity plans for investment advisers.

2. Update on discussions with the Volcker Agencies regarding the treatment of "foreign excluded funds."

3. Update on SEC and FSOC developments regarding potential designation of asset managers as "systemically important".