

investing in a  
**brighter future**

...it's a matter of time

**Mercer Global Investment Forums 2020**  
Chicago via Virtual Conferencing | 26-28 October 2020

## Agenda



Times are in US Central Daylight Time (CDT)

### Monday October 26, 2020

Time	Topic
8:00 am–12:00 pm	<b>Learn, Share and Connect Sessions</b>
1:00 pm–5:00 pm	<b>Asset Manager Briefing</b>
5:00 pm–9:00 pm	<b>Learn, Share and Connect Sessions</b>

### Tuesday October 27, 2020

Time	Topic
8:00 am–8:45 am	<b>Networking/Wellness Activity</b>
8:45 am–8:50 am	<b>Opening Remarks</b> <b>Louis Gagnon</b> , President, U.S. and Canada
8:50 am–9:00 am	<b>Welcome and Opening</b> <b>Christine Bradford</b> , Senior Not-for-Profit Consultant
9:00 am–9:25 am	<b>It's a Matter of Time: Issues, Themes and Opportunities</b> <b>Deb Clarke</b> , Global Head of Investment Research <b>Susan McDermott</b> , US Strategic Research Director
9:25 am–9:40 am	<b>Investing in a Brighter Future: Conversations with Plan Sponsors</b> <b>Facilitator:</b> <b>Rachel Volynsky</b> , Chief Investment Officer, Delegated Solutions, Canada  <b>Panelists:</b> <b>Yannick Menard</b> , Managing Director, Pension Investments, Bank of Montreal <b>Roman Kosarenko</b> , Senior Director, Pensions, George Weston Limited

<b>Time</b>	<b>Topic</b>
9:40 am–10:05 am	<b>The Future of Energy</b> <b>Monika Freyman</b> , Head of Responsible Investment, Canada <b>Rob Bailey</b> , Director, Climate Resilience, Marsh & McLennan Advantage, Oliver Wyman Group <b>Sid Vittal</b> , Asset Class Specialist, Alternatives
10:05 am–10:10 am	<b>A Timely Check-In</b> <b>Christine Bradford</b> , Senior Not-for-Profit Consultant
10:10 am–10:30 am	<b>Coffee Break and Table Topics</b> <i>Grab your beverage of choice and join one of the groups below to have an informal chat on a topic that interests you.</i>

1. Insurance Linked Strategies – A Unique Diversifying Asset Class
2. Vintage Diversification
3. Sentinel
4. Securities Lending
5. Insurance
6. DC in the U.S.
7. DC in Canada
8. DB in the US
9. DB in Canada
10. Family Offices
11. Financial Intermediaries
12. Analytic and research Tools
13. DS / Investment solutions in the US
14. DS / Investment solutions in Canada
15. Capital Market
16. Asset Allocation
17. Manager Selection
18. Portfolio Construction
19. Equities
20. Fixed Income
21. Real Estate
22. Hedge Funds
23. Private Markets
24. Emerging Markets
25. Responsible Investment
26. Investment Governance
27. Financial Wellness
28. Diversity
29. World Economic Forum – Global Systemic Trends and Transformational Investment

<b>10:30 am–10:35 am</b>	<b>Break</b>
10:35 am–11:05 am	<b>A Conversation with keynote speaker, David Gregory</b>  <b>David Gregory</b> , CNN Political Analyst  <b>Interviewer:</b> <b>Christine Mahoney</b> , Wealth Leader, US
<b>11:05 am–11:20 am</b>	<b>Break</b> <i>Perhaps use this time to try the deskercise, participate in one of the chat groups or connect with an online participant and enjoy a video chat</i>

**Time**

11:20 am–11:50 am

**Topic****Breakout 1: Value Investing: Are you Staying the Course or Finding a New Path?****Facilitator:****Kelly Henson**, DC Segment Leader, East Market**Panelists:****Rich Dell**, Global Leader, Equity Boutique**Sean Chatburn**, North America Leader, Equity Boutique**Breakout 2: Hedge Fund and Liquid Alts – Do the Merits of Diversifying Alternatives Still Stand?****Facilitator:****Jim Treanor**, Alternatives Leader, U.S. and Canada**Panelists:****Derek Drummond**, Portfolio Manager, State of Wisconsin Investment Board**Trent Webster**, Senior Investment Officer, Strategic Investments for the State Board of Administration of Florida**Breakout 3: Dealing with the Doldrums: Fixed Income Strategies in the Lower-for-Longer Environment****Facilitator:****Gregory Halagan**, Co-Head of US Insurance**Panelists:****Nicholas Martowski**, Chief Investment Officer, Magmutual**Casey Plante**, Director of Investments, M Health Fairview**Breakout 4: The Implications for Real Estate Investing in a Post COVID-19 World****Facilitator:****Allison Yager**, Global Alternatives Leader, Real Estate**Panelists:****Bill Grubbs**, Managing Director, Invesco**Jim Mattingly**, Director of Real Assets, Indiana Public Retirement System**Breakout 5: Private Equity – Is Infinite Capacity Possible in a Post COVID-19 World?****Facilitator:****Raelan Lambert**, Global Alternatives Leader**Panelists:****Amy Lesch**, Partner, Client and Partner Group, KKR**Leslie Lenzo**, Chief Investment Officer, Advocate Aurora Health

<b>Time</b>	<b>Topic</b>
12:00 pm–12:50 pm	<b>The (Hypothetical) World Pension Fund: Investment Ideas in Practice</b>  <b>CIO: Jay Love</b> , U.S. Investment Consulting Leader  <b>Sub-committee chairs:</b>  <b>Public Equity</b> <b>Nicole Delahanty</b> , Senior Investment Consultant  <b>Private Equity</b> <b>Texas Hemmaplardh</b> , Co-Head of US Endowments  <b>Fixed Income</b> <b>Chris Tschida</b> , Co-Head of US Insurance  <b>Real Estate</b> <b>David Axelson</b> , Senior Investment Consultant  <b>Hedge Funds</b> <b>Chris Grimm</b> , Co-Head of US Healthcare
12:50 pm–1:00 pm	<b>Final Remarks</b> <b>Rich Nuzum</b> , President, Wealth
1:00 pm–1:20 pm	<b>Optional: Meet the Speakers</b>

**1:30 pm–9:30 pm**    **Learn, Share and Connect Sessions**

## Wednesday 28 October 2020

<b>Time</b>	<b>Topic</b>
<b>10:00 am–9:00 pm</b>	<b>Learn, Share and Connect Sessions</b>