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Positioning for reinvention

Mercer Global Investment Forums 2021

Canada | 14-16 June | Virtual

Agenda

Times are in UTC-4 Toronto/New York

Monday June 14, 2021

MC: Pascal Leblanc-Potin, Investment Consultant

Time	Topic
7:00am–12:00pm	Learn, Share and Connect Sessions
1:00–1:30pm	Chat with other Forum participants! Public chat is open Visit our deep dive expos
1:30–4:10pm	Asset Manager Briefing
5:00–7:00pm	Learn, Share and Connect Sessions

Tuesday June 15, 2021

MC: Angelita Graham, Toronto Office Leader

Pascal Leblanc-Potin, Investment Consultant

Time	Topic
7:00–10:00am	Learn, Share and Connect Sessions
10:00–10:30am	Connect peer to peer and take the Forum quizlet to win a prize for your preferred charity
10:30–10:45am	Opening Remarks: Coming Together as One Community Teresa Palandra , Canada Wealth Leader
10:45–11:05am	2021 Investment Themes and Opportunities Jo Holden , Global Head of Investment Research Yusuke Khan , Director of Strategic Research, Canada

Time	Topic
11:05–11:25am	Taking Fresh Stocks: Four Ways to Rethink Your Equity Portfolio Host: David Willers , Senior Investment Consultant, Toronto Panelists: Marie-Léa Girouard , Investment Consultant, Montreal Dasha Zuck , Investment Consultant, Vancouver Shaun Cogswell , Investment Consultant, Halifax Claudia Lipping , Senior Investment Consultant, Toronto
11:25–11:45am	Position for Transition: Are You Ready to ACT? Jillian Kennedy , Leader of DC and Financial Wellness, Canada Lovey Sidhu , Responsible Investment Consultant, Toronto
11:45am–12:20pm	A Conversation with Keynote Speaker Mark Carney Mark Carney , Vice Chair, Brookfield, UN Special Envoy on Climate Action and Finance; Former Governor of the Bank of England and Bank of Canada; Former Chairman of the Financial Stability Board Martine Ferland , President and CEO Mercer, Vice Chair, Marsh McLennan
12:20–12:30pm	Break
12:30–12:55pm	Breakout Panel Discussions – Round 1 <ol style="list-style-type: none"> Transformational Investing: Addressing Systemic Risks for Long-term Investment Success Ashley Knight, Mercer’s Fellow at the World Economic Forum Peter Grant, Senior Investment Consultant, Norwalk Breaking the Bond: Where Will Returns Come From Going Forward? Facilitator: Todd Saulnier, Senior Investment Consultant, Ottawa Panelists: Jeff Bunce, Asset Class Specialist, Fixed Income Boutique Marlene Puffer, President and CEO, CN Investment Division The ESG Experience: Different Approaches to ESG-ing a Portfolio Facilitator: Monika Freyman, Head of Responsible Investment, Canada Panelists: Hyewon Kong, Vice President, Responsible Investing, Investment Management Corporation of Ontario (IMCO) Annette Aquin, Executive Vice President, Finance and Operations, Hamilton Community Foundation Francesca Adibe, Senior Manager, Risk Management, CBC Pension Fund How Healthy is Your DC Plan: Retirement Readiness Barometer Facilitator: Roddy MacKenzie, Investment Consultant, Toronto Panelists: Neil Lloyd, Wealth Leader, Western Canada Bernadette Chik, Senior Investment Consultant, Toronto

Time	Topic
	5. Endowment and Foundations Funds' Response to a Low Expected return Environment: A Discussion Facilitator: Peter Hallett, Senior Investment Consultant, Vancouver Panelists: Mark Campbell , Trustee and Chair, Investment Committee of the Kisoniyaminaw Heritage Trust Fund Susan Hagemeister , Director of Finance, The Winnipeg Foundation
12:55–1:25pm	Lunch
1:25–1:50pm	Breakout Panel Discussions – Round 2 <i>As above</i>
1:50–2:10pm	Keeping it Real: (Re)Positioning Infrastructure and Real Estate for the Future Brandon Perra , Real Estate Specialist, Alternatives Michael McGowan , Senior Infrastructure Specialist, Alternatives
2:10–2:20pm	Day 2 Close Angelita Graham , Toronto Officer Leader
2:20–2:40pm	Live Performance by Freeplay
4:00–7:00pm	Learn, Share and Connect Sessions

Wednesday June 16, 2021

MC: Angelita Graham, Toronto Office Leader

Pascal Leblanc-Potin, Investment Consultant

Time	Topic
7:00am–11:00am	Learn, Share and Connect Sessions
11:00–11:30am	Are We Heading for Inflation or Disinflation? Chair: Stephanie Mariamo, Senior Investment Consultant, Montreal Kimberley Hart , Senior Investment Consultant, Toronto Jonathan Croft , Senior Investment Consultant, Halifax
11:30–11:50am	Humanizing Transformation Ravin Jesuthasan , Global Leader, Transformation Services Amy Richards , Global Investment Forums Director
11:50am–12:00pm	Final Remarks Jaqui Parchment , CEO, Canada
12:00pm–8:00pm	Learn, Share and Connect Sessions