

BROCHURE

36th International Investment Funds Association (IIFA) Conference Cyprus 2023

Navigating the New
Era of Funds and Asset
Management:
Challenges, Opportunities,
Megatrends and Issues

24-25
October
2023

Parklane,
a Luxury Collection Resort & Spa
Limassol, Cyprus

Organizers



The International Investment Funds Association
L'Association internationale des fonds d'investissement



► Introduction

The 36th International Investment Funds Association (IIFA) Conference is returning, in Cyprus, providing association representatives from around the world the opportunity to discuss the key challenges impacting the investment management industry today.

► Key Topics

- International Geopolitics and Economics - The Macro View
- Navigating the new Era of Funds and Asset Management: An Industry in Transition
- ESG and Sustainability
- The Investors' Perspective
- Regulatory Issues and Trends
- The Commercial Dimension - Insights into the Business of the Fund Industry
- The Technology Revolution shaping the Funds Industry
- The Markets: Investment and Asset Management Trends to watch in 2024

► Conference Details

Tuesday, 24 October 2023 – Wednesday, 25 October 2023
Parklane, a Luxury Collection Resort & Spa
Limassol, Cyprus

► Audience

The 36th International Investment Funds Association (IIFA) Conference is addressed to International Investment Funds Association (IIFA) members and representatives.

CONFERENCE PROGRAMME

► DAY 1 / 24 October 2023

08:30-09:00 **Registration and Welcome Coffee**

09:00-09:20 **Opening Remarks and Welcome Address**

Andreas Yiaseמידes, President, Cyprus Investment Funds Association (CIFA)

09:20-09:40 **Welcome Address**

Chris Cummings, Chairman, International Investment Funds Association (IIFA), CEO, The Investment Association

09:40-10:00 **Keynote Address**

Dr George Theocharides, Chairman, Cyprus Securities and Exchange Commission (CySEC)

10:00-10:30 **Keynote Address**

International Geopolitics and Economics - The Macro View

- Major issues of global economics and international relations and their impact on business. A comprehensive overview of the global economic landscape
- Major Trends to Watch in 2024: Significant trends expected to shape the global economy in the coming year. These trends may include geopolitical shifts, economic indicators, technological advancements, or policy changes

Prof. Sir Christopher Pissarides, 2010 Nobel Prize Laureate, Regius Professor of Economics, London School of Economics, Professor of European Studies, University of Cyprus

10:30-11:30

Panel Discussion: Navigating the New Era of Funds and Asset Management: An Industry in Transition

- Global Trends in the Funds and Asset Management Sector: The current state of the funds and asset management industry worldwide, emerging trends, market dynamics, and regulatory developments
- Challenges and Opportunities and Major Issues of the Industry: Challenges faced by the industry, such as regulatory compliance, changing investor preferences, and disruptive technologies as well as opportunities and potential solutions
- The Agenda of Business Leaders: Insights and Strategies for navigating the evolving landscape of funds and asset management. Business Leaders' priorities, vision, and approaches to addressing industry challenges
- Inflation, Recession-Resistance Investing, ESG Returns, and the Collapse of Crypto: The effects of inflation on investment strategies, recession-resistant investment approaches, performance of environmental, social, and governance (ESG) investments, and assess the implications of the cryptocurrency market collapse

Moderator:

Andreas Yiaseמידes, President, Cyprus Investment Funds Association (CIFA)

Panelists:

- **Małgorzata Rusewicz**, President of the Management Board, Chamber of Fund and Asset Managers, Chamber of Pension Funds
- **Marie E. Dzanis**, Former CEO and Head of Asset Management EMEA
- **Reda Hilali**, President, Association des Sociétés de Gestion et Fonds d'Investissements Marocains (ASFIM)
- **Theofanis Mylonas**, Secretary of the Board of Directors, Hellenic Fund and Asset Management Association

11:30- 11:40

Q&A Session

11:40-12:25 Networking Coffee Break

12:25-13:25 **Panel Discussion: ESG and Sustainability**

- **Impact Investing and Sustainability:** The concept of impact investing, which involves making investments that generate positive social and environmental impacts alongside financial returns. The growing importance of sustainability considerations in investment decision-making
- **ESG stands for Environmental, Social, and Governance factors,** which are used to evaluate the sustainability and ethical impact of investments. Exploration of the integration of ESG criteria into investment strategies and the significance of considering ESG factors to manage risk and enhance long-term value
- **Measuring the Impact of Sustainable Funds:** The methodologies and frameworks used to measure the impact of sustainable funds and how impact metrics and reporting standards enable investors to assess the tangible outcomes and sustainability contributions of their investment portfolios
- **Investing in the Path to Net-Zero:** The increasing focus on investing in companies and projects that support the transition to a net-zero carbon emissions future. Strategies, investment opportunities, and challenges related to financing and supporting the global transition to a low-carbon economy
- **Innovations in Sustainable Investing:** Innovative approaches and financial products in sustainable investing and new investment strategies, such as thematic funds that focus on specific sustainability themes like renewable energy, clean technology, or water conservation
- **Shifting Allocations Preferences in Sustainable, Impact, and Thematic Funds:** The changing preferences of leading fund selectors regarding sustainable, impact, and thematic funds and the factors driving these shifts, such as increased awareness of sustainability issues, regulatory developments, and evolving investor demand. Exploration of how fund selectors are adapting their allocation strategies to align with sustainable investing principles and meet the expectations of socially conscious investors

Moderator:

- **Andreas Yiasezides**, President, Cyprus Investment Funds Association (CIFA)

Panelists:

- **Gema Esteban Garrido**, Global Head of ESG, IG4Capital
- **Tsung-Sheng Liu**, Chairman, Securities Investment Trust & Consulting Association, Chinese Taipei
- **Valentin I. Galardi**, Chairman, Argentine Mutual Funds Association (CAFCI)

13:25-13:35 Q&A Session

13:35-13:50 **Official Photo Session**

13:50-15:05 Networking Lunch Break

15:05-15:35 **Fireside Chat: The Investors' Perspective**

- **The Appetite of Institutional Investors:** The investment strategies and preferences of institutional investors, such as pension funds, sovereign wealth funds, and endowments as well as factors influencing their decision-making and their impact on the funds industry
- **Andreas Yiasezides**, President, Cyprus Investment Funds Association (CIFA)
- **Pat Lardner**, Chief Executive, Irish Funds

15:35- 15:40 Closing Remarks – End of Day 1

08:30-09:00 Registration and Welcome Coffee

09:00-09:05 Opening Remarks

Andreas Yiaseמידes, President, Cyprus Investment Funds Association (CIFA)

09:05-10:05 **Panel Discussion: Regulatory Issues and Trends**

- Regulatory issues and trends impacting the funds industry as well as evolving regulations, compliance challenges, and the implications for fund managers, investors, and other industry stakeholders

Moderator:

• **Andreas Yiaseמידes**, President, Cyprus Investment Funds Association (CIFA)

Panelists:

- **Chris Cummings**, Chairman, International Investment Funds Association (IIFA), CEO, The Investment Association
- **Eva Mykolenko**, Associate Chief Counsel, Securities Regulation, Investment Company Institute (ICI) Global

10:05-10:15 Q&A Session

10:15-11:00 Networking Coffee Break

11:00-12:00 **Panel Discussion: The Commercial Dimension - Insights into the Business of the Fund Industry**

- Fund Management and Fund Administration: Insights into the operational aspects of the fund industry, including fund management and administration - best practices, operational efficiency, and the role of technology
- The Business Case and the Commercial Dimension of the Funds Business: The commercial aspects of the funds industry, including revenue models, profitability, distribution strategies, and client engagement.

Moderator:

• **Andreas Yiaseמידes**, President, Cyprus Investment Funds Association (CIFA)

Panelists:

- **Roberto Colicci**, Head of Business Development and Client Relationship Management Europe WLS, UBS Asset Management
- **Thomas Richter**, Chief Executive Officer, German Investment Funds Association (BVI)
- **Panikos Teklos**, Vice President, Cyprus Investment Funds Association (CIFA)

12:00-12:10 Q&A Session

12:10-12:55 **In Conversation with the Experts: The Technology Revolution Shaping the Funds Industry – The Digital and Innovation Session**

- Key Technology Trends Transforming the Funds Industry: The transformative role of technology trends in the funds industry such as artificial intelligence (AI), blockchain, fintech (financial technology), regtech (regulatory technology), and the emerging concept of the metaverse
- How these technologies are revolutionizing fund management, distribution, compliance, and customer experiences.

Moderator:

• **Andreas Yiaseמידes**, President, Cyprus Investment Funds Association (CIFA)

Panelists:

- **Adrian Schatzmann**, CEO, Asset Management Association Switzerland (AMAS)
- **Brian Evergreen**, Founder and CEO, The Profitable Good Company
- **Edward Glyn**, Managing Director, Head of Global Markets, Calastone

12:55-14:10 Networking Lunch Break

14:10-14:50 **In Conversation with the Experts: The Markets: Investment and Asset Management Trends to Watch in 2024**

- Investment and asset management trends that are expected to shape the financial markets in 2024. Insights into market dynamics, potential opportunities, and emerging risks

Moderator:

- **Andreas Yiaseמידes**, President, Cyprus Investment Funds Association (CIFA)

Panelists:

- **Judy Goldring**, Chair, The Investment Funds Institute of Canada (IFIC), LL.B, LL.D, ICD.D, President and Head of Global Distribution, AGF Management Limited
- **Ryan McNelley**, Managing Director, Portfolio Valuation, Kroll Advisory Ltd

14:50-15:00 Closing Remarks – End of Conference



ORGANIZERS



The International Investment Funds Association
L'Association internationale des fonds d'investissement

Recognizing the importance of the role of investment funds and of their responsibilities to investors, the mission of The International Investment Funds Association is to promote the protection of investment fund investors, to facilitate the growth of the investment funds industry internationally, to act as a medium for the advancement of understanding of the investment fund business around the world, and to encourage adherence to high ethical standards by all participants in the industry.



CIFA is the association of professionals, businesses, and organizations involved in the Investment Funds and Asset Management Sector in Cyprus. CIFA has more than 400 members, legal and physical. The Mission of CIFA is to help its members capitalize on industry trends, shape regulation, enhance professionalism, integrity, and quality and promote the Cyprus Investment Fund Industry. The Association's Board is comprised of highly reputable industry professionals experienced in all aspects of the industry. CIFA is a full member of the International Investment Funds Association and the European Funds and Asset Management Association. The fund industry in Cyprus has been growing rapidly, with Assets under Management reaching almost €10 billion.



CONFERENCE CHAIR

ANDREAS YIASEMIDES, President, Cyprus Investment Funds Association (CIFA) / Partner, Clients & Markets Leader and In charge of Fund Services, PwC Cyprus

Andreas Yiasemidis is a Partner at PwC Cyprus, Head of Risk, Compliance & Regulation, Clients & Markets Leader, In charge of Funds Services. On his graduation from the University of Manchester with a first-class honors degree in Economics, he joined PwC in 1999 and qualified as a Chartered Accountant (FCA). He continued his career at the Bank of Cyprus, holding various positions including head of the Custody and Trusts Unit. Before returning to PwC in late 2016 as a Partner, he was leading the Fund Services Unit of Treppides Group. He has served as a member of the Board of the Bank of Cyprus and of the Central Bank of Cyprus. He currently serves as the Chairman of the Board of Directors of the Cyprus Investment Funds Association (CIFA) and of the Cyprus-India Business Association Committee established by the Cyprus Chamber of Commerce and Industry (CCCI). He is also a member of the Cyprus National Advisory Council of the Charter Institute for Securities and Investment (CISI). He is the holder of an MBA from the University of Leicester.



CHRIS CUMMINGS, Chairman, International Investment Funds Association (IIFA), CEO, The Investment Association

Chris Cummings is the Chief Executive of The Investment Association, a post he has held since September 2016. The Investment Association is the trade body that represents UK-based investment managers. He is a member of HM Treasury's Asset Management Taskforce, and was a founding member of its Financial Services Trade & Investment Board. He serves on the Chancellor's Financial Services Industry Advisory Group and Department for International Trade's Financial Services Trade Advisory Group. He is a Board member on EFAMA, the European trade association for investment management and is Chairman of IIFA, the international association for investment management. He is also a Trustee of Just Finance Foundation. He was previously a member of the Financial Conduct Authority's Regulatory Decisions Committee, a Settlement Decision Maker for the Payment Services Regulator. He served on the Foreign & Commonwealth's Diplomatic Excellence Panel. Before joining The Investment Association he was the founding CEO of TheCityUK, held senior posts in banking, insurance and consulting with major global firms. He is a regular columnist, commentator and speaker on issues of international competitiveness and regulation in financial services.



DR. GEORGE THEOCHARIDES, Chairman, Cyprus Securities and Exchange Commission (CySEC)

Dr. George Theocharides (BEng (Hons), MBA, PhD) is the Chairman of the Cyprus Securities and Exchange Commission (CySEC). He is also the Chairman of the Risk Standing Committee (RSC). The RSC is part of the European Securities and Markets Authority (ESMA) and the successor of the Committee for Economic and Markets Analysis (CEMA), for which Dr. Theocharides served also as Chairman, between March and December 2022. He served as CySEC's Vice Chairman from July 2020 to September 2021 and was previously a CySEC Board member. He has extensive experience working in the wider financial sector. From September 2010 until July 2020, he held the position of Associate Finance Professor at the Cyprus International Institute of Management (CIIM) and Director of the MSc in Financial Service Programme. Prior to joining CIIM, he worked as an Assistant Professor of Finance at the Sungkyunkwan University of South Korea from 2006 to 2010. In 2006, he also worked as an International Faculty Fellow at the Sloan School of Management of the Massachusetts Institute of Technology (MIT). In the past, he served as a member of the Interim Board of Bank of Cyprus, Chairman of the Board of the Cyprus Blockchain Technologies Ltd, among others.



PROF. SIR CHRISTOPHER PISSARIDES, 2010 Nobel Prize Laureate, Regius Professor of Economics, London School of Economics, Professor of European Studies, University of Cyprus

Sir Christopher Pissarides is the 2010 Nobel Prize laureate in economics, the Regius Professor of Economics at the London School of Economics and the Professor of European Studies at the University of Cyprus. He is a macroeconomist who specialises in the economics of labour markets, economic growth and structural change, especially as they relate to obstacles to free-market clearing. He has published extensively in academic journals and his book *Equilibrium Unemployment Theory* is a standard reference in the academic literature on unemployment, which has influenced extensively labour market policies. He has received several prizes, awards and prestigious Academy fellowships for his work, including the Grand Cross of the Republic of Cyprus and a knighthood from Queen Elizabeth II. In the last decade he has mainly worked on the employment implications of automation and artificial intelligence and on the emergence of China as a global economic power. He has recently been involved in the preparation of a Report on the development of the Greek economy, which bears his name, and through his position as Co-Chair of the Institute for the Future of Work in London he is actively involved in securing the conditions for the creation of good work in the age of automation.



MAŁGORZATA RUSEWICZ, President of the Management Board, Chamber of Fund and Asset Managers, Chamber of Pension Funds

Małgorzata Rusewicz graduated from the Law Faculty at the University of Białystok and completed post-graduate studies in insurance at the Warsaw School of Economics. She started her career as a lawyer at the Social Insurance Institution. In subsequent years she cooperated with the Institute of Labor and Social Affairs and the University of Ghent. From 2007 to 2012 she worked in the Polish Confederation Lewiatan as director of the Department of Social Dialogue and Labor Relations and Coordinator of the Labor Market Council. She was a member of the Tripartite Commission, Social Dialogue Committee at the European Commission and expert groups functioning within BUSINESSEUROPE. Since May 2013 she became the President of the Chamber of Pension Funds. In 2019 she was also appointed as the President of the Chamber of Fund and Asset Managers. At the moment she represents two sectors of institutional investors in Poland.



MARIE E. DZANIS, Former CEO and Head of Asset Management EMEA

Marie is a former Chief Executive and former Head of Asset Management for Europe Middle East and Africa. She has had accountability across entire businesses including strategy, governance, operations, portfolio management, product, risk, compliance, talent, business and client development. Recognized with a top “Women To Watch” award and multiple “Top Women in Asset Management” awards, Marie specialises in transformative change. She has held executive and leadership positions at top tier firms throughout her career, and has multiple lenses into the manufacturing, strategy, ESG leadership, digital and technology perspective with keen empathy for client needs. Marie has managed and has transformed several lines of business with institutional, intermediary and wealth channels. She has worked in securities lending and trading, product development, product sales, sales management and branch management, and began her career in the industry as a financial advisor. She was the CEO of Northern Trust Global Investments LTD, serves on several affiliate boards, cross business and executive committees within Northern Trust. She is on the board of Directors for the Investment Association of the UK and the Irish Association of Investment Management. She is the Chair for the Investment Association UK Finance, Audit and Risk committee. She is on the women’s board of the University of Chicago Cancer Foundation, involved in Women in ETFs and is on the Advisory Board For BlinkNow Foundation and is a producer for the Maggie Doyne documentary called “Love letters to my children”. She and her husband David are passionate about children’s education and leadership.



REDA HILALI, President, Association des Sociétés de Gestion et Fonds d’Investissements Marocains (ASFIM)

Reda Hilali started his career as a Fixed Income portfolio manager in Crédit du Maroc Gestion before joining OCP, The Moroccan Phosphate Company, in the finance department. In 2007, he joined the investment team of Wafa Gestion, an investment management company subsidiary of both Attijariwafa Bank and Amundi Asset Management, before being appointed Chief Investment Officer in 2012 then Chief Executive Officer in 2016. In 2021, Mr. Hilali was elected president of ASFIM, The association of management companies and investment funds. Mr. Hilali holds an engineering degree in computer science from Ecole Nationale de l’Industrie Minérale in Rabat (ENIM) as well as the Chartered Financial Analyst (CFA) designation.



THEOFANIS MYLONAS, Secretary of the Board of Directors, Hellenic Fund and Asset Management Association

Theofanis Mylonas is Chairman of the Board of Directors and Chief Executive Officer of Eurobank Asset Management M.F.M.C. He is also Chairman of the Board of Directors of Eurobank Fund Management Co (Lux) SA. Within Eurobank Group, he was Head of Global Markets Trading and member of various investment and other committees. Prior to this, and within Global Markets, he was Assistant General Manager, Co-Head Global Markets Trading. In the past, he had various managerial positions within Global Markets. He has also worked as Head of Fixed Income Trading – Greece, in Treasury Dealing Room of Citibank / Schroder Salomon Smith Barney in Greece and the UK. Mr. Mylonas holds a M.Sc. in Finance from the University of Strathclyde and a high Honours B.Sc. in Business Studies from the University of Buckingham.



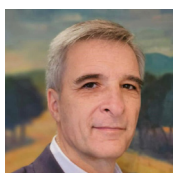
GEMA ESTEBAN GARRIDO, Global Head of ESG, IG4Capital

Gema Esteban Garrido has an Advanced Management degree from IESE Business School, an Investment Management degree from Université de Geneva, and a bachelor's degree in Computer Science from Universidad Pontificia de Salamanca in Madrid. She is also certified in ESG Investing by the CFA Institute UK. Gema is Global Head of ESG at IG4 Capital a private equity firm where she is responsible for fully embedding ESG into its Investment Cycle as well as driving its portfolio companies towards the highest ESG standards. She is president of the ESG Committees of the Board in IGUÁ Saneamiento (water infrastructure), OPY Health (healthcare infrastructure), CLI (agricultural), AENZA (Infra) and ADELCO (B2B logistics). She serves as Board member at AENZA infrastructure. Prior to joining IG4 Capital, she spent several years at Telefónica, most recently as ESG Investors Director (2018-2020), where she revamped Telefónica's ESG strategy in order to attract ESG investors and positioned the company as a leader amongst the most influential ESG ratings, where Telefónica consistently achieved a top 5 ranking. Previously she held different executive roles at Telefónica ranging from Digital Strategy, Industry Analyst Relations, Global Operations Strategy or Strategic Business planning. Prior to these roles she worked at British Telecom and in the Software Industry. She is an expert in ESG investing and digital strategy. She is able to develop future strategic insights and embed ESG parameters in the company strategy focusing in the company value generation. She is associated professor in the Corporate Governance Center of ESADE and IE Business School where she teaches Digital Strategy and was awarded in 2010 with MAKE award (Most Admired Knowledge Enterprise).



TSUNG-SHENG LIU, Chairman, Securities Investment Trust & Consulting Association, Chinese Taipei

Dr. Julian is recognized as founder of Taiwan ETFs and pioneer of financial innovation. He has been leading the industry by introducing AI and ESG into investment management while making Yuanta SITC the only financial institution in Taiwan with 19 patents across financial operation, Fintech and Robo. Under Julian's leadership, Yuanta SITC has the only ETF issuance experience in six Asian countries as well as exposures in Asia with ETF advisory capability. Yuanta SITC is the largest mutual fund asset manager in Taiwan and continuing to evolve from product provider to solution provider. Yuanta SITC launched Taiwan's first ESG ETF while implementing ESG investment principle. Julian has a very comprehensive financial background with working experiences from Greater China region and Thailand. He has been awarded by multiple domestic and international agencies and magazines for his achievement and contributions. Awards such as CFA Society Taiwan Excellence Award in 2019, EY Entrepreneur of the Year in 2018, Best ETF CEO by Asia Asset management in 2016. Moreover, Julian has published 70 books for investor education while taking on the role as chair professor in local universities.



VALENTÍN I. GALARDI, Chairman, Argentine Mutual Funds Association, (CAFCI)

Valentín Galardi is Chairman of Argentine Mutual Funds Association, a role he has held since 2015. He currently serves as the Chairman of the Iberoamerican Federation of Mutual Funds (FIAFIN). Valentín is a member of the Board of Directors of the International Investment Fund Association (IIFA) since 2016. He is also a member of the de Buenos Aires Stock Exchange's Executive Counsel. He joined BBVA (Banco Bilbao Vizcaya Argentaria) in 1994. He spent three years in BBVA Asset Management (Madrid- Spain). In 2005 was promoted to serve as Deputy Chair of BBVA Francés Asset Management S.A (Argentina) and became a Chairman in 2008 until 2015 when he decided to step down to join Argentine Mutual Funds Association as Chairman. He is a lawyer graduate of the University of Buenos Aires (UBA) and received a master's degree in Business Law from Universidad Austral.



PAT LARDNER, Chief Executive, Irish Funds

Pat Lardner joined Irish Funds as Chief Executive in April 2012. He has over thirty years' experience in the global funds and asset management industry and has held leadership positions in Ireland and overseas with both traditional and alternative asset management firms. Domestically, he is an active participant on all key government and regulator sponsored groups relating to the industry. He is a member of the Board of the European Fund and Asset Management Association (EFAMA), the International Investment Funds Association (IIFA) and basis.point, the charity of the funds industry and its wider ecosystem. He was previously an Advisor to the Asset Management Association of China's International Partners Committee and a Council Member of the Irish Association of Pension Funds. He attained honours undergraduate and postgraduate degrees at University College Dublin.



EVA MYKOLENKO, Associate Chief Counsel, Securities Regulation, Investment Company Institute (ICI) Global

Eva M. Mykolenko is Associate Chief Counsel, Securities Regulation with the Investment Company Institute and ICI Global. Mykolenko advocates on behalf of global regulated funds and their investors to securities regulators and multinational organizations in the United States and abroad. She started with the Institute in 2008 after more than eight years in private practice at Willkie Farr & Gallagher LLP and Shearman & Sterling LLP. While in private practice, Mykolenko advised mutual fund, hedge fund, and investment adviser clients on a variety of compliance, regulatory, and transactional matters. Mykolenko received her undergraduate degree from the University of Michigan and her law degree from the University of Michigan Law School.



ROBERTO COLICCI, Head of Business Development and Client Relationship Management Europe WLS, UBS Asset Management

Roberto Colicci is an experienced professional in the fund industry, who joined UBS Asset Management in 2019 and led the business development and client relationship management in Europe for the White Labelling Solutions division. Before joining UBS, AM Roberto has worked for MUFG Investor Services and Edmond de Rothschild Europe.



THOMAS RICHTER, Chief Executive Officer, German Investment Funds Association (BVI)

Thomas Richter was born on 8 June 1966 in Ansbach. He studied law and French in France and Augsburg, worked for a law firm in Toronto and is a certified stock exchange trader and investment analyst DVFA/CEFA. From 1995 to 1998, Thomas Richter worked at Deutsche Börse AG and then in managerial positions at DWS until 2007. From 2007 to 2010, he was a member of the management of DWS and a member of the BVI Executive Board. He has been with BVI since 2010. Thomas Richter is a member of the Administrative Council of BaFin and of the advisory board for Financial Markets Monitoring of the Verbraucherzentrale Bundesverband (vzbv). He also is on the Board of the International Investment Funds Association IIFA.



PANIKOS TEKLOS, Vice President, Cyprus Investment Funds Association (CIFA)

Panikos Teklos is the Vice President of CIFA and Chief Executive Officer of a private company specializing in financial advisory services, financial technology, private equity and multi-family office services. He has more than 22 years of international experience in Investment Banking, Strategy, Consulting, Asset and Wealth Management. He is a specialist in Governance, Risk & Regulation, Investment Management, FinTech & RegTech, structured solutions and business advisory for Financial Institutions, Family Offices, HNWI/UHNWI and Corporates. He holds a BSc in Economics and an MSc in Finance and Economics.



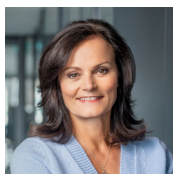
ADRIAN SCHATZMANN, CEO, Asset Management Association Switzerland (AMAS)

Adrian Schatzmann became CEO of the Asset Management Association Switzerland (AMAS) in January 2021. He is also a board member of the European Fund and Asset Management Association (EFAMA) and a member of the Board of Directors of Swiss Fund Data AG. Prior to that, he held various consulting positions, including with the Swiss Bankers Association (SBA), and was founder and Managing Director of Clear Minds Investment AG. Adrian worked for UBS for more than 20 years in Switzerland and Asia in roles such as head of global fund and ETF distribution. He studied economics at the University of St. Gallen.



EDWARD GLYN, Managing Director, Head of Global Markets, Calastone

Edward Glyn joined Calastone in 2014 and is responsible for managing and developing key client relationships across global markets. Before joining Calastone, he spent nine years at SWIFT, most recently heading up the 100m transaction funds business across EMEA and leading the regional sales team managing SWIFT's investment management, custody and asset servicing offerings. Prior to this, he spent a number of years in key commercial and strategic roles at Investia (former parent of JPMorgan FundsHub), ERI Bancaire, Thomson Financial and Tajan.



JUDY GOLDRING, Chair, The Investment Funds Institute of Canada (IFIC), LL.B, LL.D, ICD.D, President and Head of Global Distribution, AGF Management Limited

Judy G. Goldring is the President and Head of Global Distribution at AGF Management Limited. Judy brings unified accountability to and fosters greater synergies across AGF's respective sales distribution channels globally. In addition, she oversees the firm's Human Resources function and is responsible for AGF's Private Client business. Judy is a member of the Board of Directors for AGF Management Limited and AGF Mutual Funds. Judy is Vice-Chair of The Investment Funds Institute of Canada (IFIC)'s Board of Directors and sits on the Board of the Toronto French School (TFS), Canada's International School. In addition, she is the Co-Chair of the Victoria University "Defy Gravity" Campaign. In 2015, Judy was named a Top 100 Hall of Fame Inductee by the Women's Executive Network™ (WXN).



RYAN MCNELLEY, Managing Director, Portfolio Valuation, Kroll Advisory Ltd

Ryan McNelley is a managing director in the London office of Kroll, and part of the Portfolio Valuation service line. Ryan's clients primarily include alternative investment fund managers, including private equity and private debt fund managers, hedge fund managers, infrastructure fund managers, real estate debt fund managers, etc., in both Europe and in the U.S. Ryan specializes in the valuation of illiquid investments, typically under the IFRS 13, ASC 820 or other local GAAP Fair Value standards used by alternative investment managers.