

PROGRAM FLOW

Day 1: Thursday, December 1, 2016

- 7:00 AM **BREAKFAST AND REGISTRATION**
- 8:45AM **WELCOME REMARKS**
Gerard S.A. Perez, Chairman Emeritus, Board of Governors, APAFS
- 9:00 AM **OPENING KEYNOTE ADDRESS**
Gregorio S. Navarro, Managing Partner and CEO, Deloitte Philippines/ Navarro Amper and Co.
- 10:00 AM **NETWORKING AND COFFEE BREAK**
- 10:15 AM **SESSION 1: GLOBAL INVESTMENT PERFORMANCE STANDARDS (GIPS)**
Robert Ramos, CFA[®], First Vice President and Head of Trust and Investment Services Group, Union Bank of the Philippines
Trevor Persaud, Head of Insurance, Asia, Financial Institutions Group, Standard Chartered Bank
Gerard A. Cruz, AIFA[®], Treasurer, Board of Trustees, Government of Guam Employees Retirement Fund - Moderator
- 11:15 AM **SESSION 2: DEVELOPMENT FINANCE INSTITUTIONS (DFIs) FOR CORPORATE GOVERNANCE**
Jean-Philippe de Jong, Chief Executive Officer, Association of Development Financing Institutions in the Pacific
Perla Melanie C. Caraan, First Vice President & Chief Governance Officer, Development Bank of the Philippines
Valentino S. Bagatsing, Principal Investment Officer, East Asia and Pacific, International Finance Corporation
Alberto Reyno, Managing Principal, Association of Development Financing Institutions in Asia and the Pacific - Moderator
- 12:15 PM **WORKING LUNCH: IS A PARADIGM SHIFT TAKING PLACE IN FIXED INCOME INVESTING?**
Craig "Chip" Odell Bailey, Jr., Executive Vice President, NWQ Investment Management Company, LLC
- 1:15 PM **SESSION 3: VALUE INVESTING IN VOLATILE MARKETS**
Valerie Newman, CFA[®], Senior Client Portfolio Manager, Perkins Investment Management LLC, Janus Capital Group
- 2:15 PM **SESSION 4: MANAGING TRUST FUNDS IN THE PACIFIC – LESSONS LEARNED**
Christopher Edmonds, Senior Economist, Asian Development Bank
Lindsay M. Timarong, Secretary and Treasurer Trustee, ROP COFA Trust Fund
Palipa Lauti, Chairlady, Tuvalu National Provident Fund
Benjamin M. Graham, Senior Evaluation Specialist, Asian Development Bank - Moderator
- 3:45 PM **NETWORKING AND COFFEE BREAK**
- 4:00 PM **SESSION 5: ASSET RECOVERY METHODS FOR FIDUCIARIES**
Darren J. Robbins, Founding Partner, Robbins Geller Rudman and Dowd LLP
- 5:00 PM **END OF PROGRAM**

PROGRAM FLOW

Day 2: Friday, December 2, 2016

- 7:00 AM **BREAKFAST AND REGISTRATION**
- 8:45 AM **WELCOME REMARKS**
The Honorable Elbuchel Sadang, Minister of Finance, Republic of Palau
- 9:00 AM **SESSION 1: COMMON FIDUCIARY PITFALLS IN MANAGER SEARCHES & EVALUATION**
Patrick M. Schussman, CFA[®], CIMA[®], AIF[®], Managing Director, Aristotle Capital Management LLC
- 10:00 AM **SESSION 2: PROTECTING TRUST FUND ASSETS & FIDUCIARIES THROUGH LEGISLATION**
Donald Clark, AIF[®], Executive Vice President and Director of Compliance, ASC Trust Corporation
Kembo Mida, Jr., Esq., Ramp & Mida Law Firm
Melanie Lawrence Aiseam, Pohnpei Branch Manager, ASC Trust Corporation - Moderator
- 11:00 AM **NETWORKING AND COFFEE BREAK**
- 11:15 AM **SESSION 3: THE POWER OF COMPOUNDING**
Luke Theeuwes, Principal, Miller/Howard Investments
- 12:15 PM **LUNCH**
- 1:15 PM **SESSION 4: OUTLOOK FOR REITS**
Tom Budinger, AIF[®], Vice President, Adelante Capital Management LLC
Anna Zhong, CFA[®], Portfolio Manager, Asia, Cornerstone Real Estate Advisers LLC
David M. O'Brien, AIF[®], Member, Board of Trustees, Government of Guam Employees Retirement Fund - Moderator
- 2:15 PM **SESSION 5: GLOBAL EQUITY MARKETS OUTLOOK**
Andrew M. Temming, CFA[®], Portfolio Manager, Renaissance Investment Partners
Craig "Chip" Odell Bailey, Jr., Executive Vice President, NWQ Investment Management Company, LLC
Jason B. Miyashita, CIMA[®], CRPS[®], AIFA[®], Senior Vice President, Raymond James - Moderator
- 3:15 PM **SESSION 6: GLOBAL FIXED INCOME MARKETS OUTLOOK**
Jeffrey Detwiler, CFA[®], Portfolio Manager, Garcia Hamilton and Associates
Jason Stewart, CIMA[®], Southwest Regional Director, Chartwell Investment Partners
Timothy Tarpenting, Managing Director, Pacific Income Advisors - Moderator
- 4:15 PM **CLOSING REMARKS: APAFS: PLANS FOR 2016 AND BEYOND**
Gerard A. Cruz, AIFA[®], Chairman, Board of Governors, Asia Pacific Association for Fiduciary Studies
- 4:30 PM **END OF PROGRAM**