



association of the
luxembourg fund industry

3rd Day Special Topic
17 March 2011
ALFI Microfinance Conference

alfi spring conference

15 & 16 March 2011



Better regulation.
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15 March 2011



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programme day 1 - tuesday 15th march 2011 a.m.

08.00 – 08.45	<i>Registration & breakfast</i>
08.45 – 08.55	Opening remarks Claude Kremer, Chairman, ALFI, Luxembourg
08.55 – 09.05	Chairperson's introduction Freddy Brausch, Partner, Linklaters LLP, Co-Chair of the ALFI Legal and Regulatory Committee, Member of the ALFI Board
09.05 – 09.40	From UCITS to AIF Impact of the new regulatory framework for the Luxembourg Fund Industry Marc Saluzzi, Partner, Luxembourg Financial Services Leader, PwC
09.40 – 10.15	The investor's perspective Guillaume Prache, Managing Director, EuroInvestors, Brussels
10.15 – 10.45	<i>Refreshment break and visit of the exhibition area</i>
10.45 – 11.45	UCITS IV: Concrete impacts on your business strategy Moderator: - Christophe Wintgens, Partner, Financial Services Advisory Leader, Ernst & Young, Luxembourg - Marnix Arickx, Managing Director, Head Fund Engineering, BNP Paribas Investment Partners Belgium N.V. / S.A, Brussels - Allan Pelvang, Group Head of Tax & Country Head, Fidelity International, Luxembourg - Sanjiv Sawhney, Global Head of Fund Services, Citi, Luxembourg - Jeremy Soutter, Global Head of Product, Aviva Investors, London
11.45 – 12.25	Switched on - developing an entrepreneurial mindset Sahar Hashemi, Coffee Republic & Skinny Candy, Entrepreneur and bestselling author, London
12.25 – 12.30	Chairperson's wrap up and closing remarks
12.30 – 14.00	<i>Lunch hosted by Ernst & Young and State Street</i>

programme day 1 - tuesday 15th march 2011 p.m.

14.00 – 14.05	<p>Chairperson's introduction</p> <p>Freddy Brausch, Partner, Linklaters LLP, Co-Chair of the ALFI Legal and Regulatory Committee, Member of the ALFI Board</p>
14.05 – 14.45	<p>PRIPS: challenges ahead</p> <p>Moderator: - David Rouch, Partner, Freshfields Bruckhaus Deringer, London - Tim Shakesby, Policy Officer, European Commission, DG Internal Market and Services, Brussels - Peter Smith, Head of Investments Policy, Financial Services Authority, London</p>
14.45 – 15.40	<p>KIID: 100 days to launch</p> <p>Moderator: - Noel Fessey, Managing Director, Schroder Investment Management (Luxembourg) S.A. - David Glassey, Senior Vice President, Senior Legal Manager (Products), Pioneer Investments, Dublin - Graham Goodhew, Director and Conducting Officer, JP Morgan Asset Management (Europe) S. à r.l, Luxembourg - Geoff Radcliffe, Managing Director, BlackRock (Luxembourg) S.A. - Bernhard Schneider, Head Product Development, Harcourt Investment Consulting, Zurich</p>
15.40 – 16.10	<p><i>Refreshment break and visit of the exhibition area</i></p>
16.10 – 16.50	<p>FATCA: impact on European fund business</p> <p>Moderator: - Paul Chambers, Partner, ATOZ, Luxembourg - Frederic Batardy, Senior Tax Adviser, KBL European Private Bankers S.A., Luxembourg - Keith Lawson, Senior Counsel - Tax Law, ICI</p>
16.50 – 17.50	<p>Out of the shadows into the light. Are platforms the new super distributors?</p> <p>Moderator: - Rodney Williams, CEO, MackayWilliams, London - Olivier Portenseigne, Director, Product Management Shareholder Services and Distribution Support, RBC Dexia Investor Services, Esch-sur-Alzette - Uwe Dietl, Head of Sales Institutional Clients, attrax, Luxembourg - Richard Lepere, Managing Director, Fund Channel, Luxembourg - John Pauly, CEO, Moventum, Luxembourg</p>
17.50 – 18.00	<p>Closing remarks</p>
from 18.00	<p><i>ALFI Gala Dinner at the Philharmonie</i></p> <p><i>Not included in the conference registration. For last minute registration please contact the registration desk.</i></p>

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16 March 2011



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programme day 2 - wednesday 16th march 2011 a.m.

08.00 – 08.45	<i>Registration & breakfast</i>
08.45 – 08.55	Chairperson's introduction Denise Voss, Conducting Officer, Franklin Templeton Investments, Luxembourg
08.55 – 09.30	The role of asset managers in enabling financial stability in retirement Elisabeth Corley, CEO, Allianz Global Investors Europe GmbH, Munich
09.30 – 10.25	Alternative UCITS: achievements and expectations Moderator: - Jacques Elvinger, Partner, Elvinger, Hoss & Prussen, Luxembourg - Alain Dubois, Chairman of the Board, Lyxor Asset Management, Paris - Shoqat Bunglawala, Managing Director, Head of Product Strategy and Development, Goldman Sachs Asset Management, London - Gavin Byrnes, Head of Sales & Product Development, SEB Fund Services S.A, Luxembourg - Alex Mckenna, Director, Head of Fund Structuring, Global Markets Structuring db-X Funds, Deutsche Bank, London - Eric Personne, Chairman of Merrill Lynch Investment Solutions SICAV, Merrill Lynch International, London
10.25 – 10.55	Fund Governance: current status and challenges Henry Kelly, Independent Director, KellyConsult, Luxembourg
10.55 – 11.25	<i>Refreshment break and opportunity to visit the exhibition area</i>
11.25 – 11.45	Risk Management: regaining control of financial markets Philippe Carrel, Executive Vice President, Risk Management, Thomson Reuters, Geneva
11.45 – 12.25	Demystifying Risk Management for Investment Funds The added value behind the techniques Moderator: - Xavier Zaegel, Partner, Deloitte, Luxembourg - Philippe Carrel, Executive Vice President, Risk Management, Thomson Reuters, Geneva - Luc Neuberg, Sous-Directeur, Head of Risk & Operations, BCEE Asset Management, Luxembourg - Claude Wampach, Co-Head of Risk Management/Banking Supervision, Commission de Surveillance du Secteur Financier, Luxembourg
12.25 – 12.30	Chairperson's wrap up and closing remarks
12.30 – 14.00	<i>Lunch hosted by Allianz Global Investors and Arendt & Medernach</i>

programme day 2 - wednesday 16th march 2011 p.m.

14.00 – 14.05	Chairperson's introduction Julien Zimmer, General Manager Investment Funds, DZ PRIVATBANK, Luxembourg
14.05 – 14.50	Solvency II: threats and opportunities for the Asset Management Industry Patrick Burke, Chairman, European Federation for Retirement Provision Robert Deed, Executive Director, Corporate Policy & Risk, Lombard International Assurance S.A., Luxembourg Thierry Flamand, Board Member, Association Luxembourgeoise des Actuaires, Luxembourg
14.50 – 15.35	The Road to UCITS V - a regulatory update Moderator: - Jérôme Wigny, Partner, Elvinger, Hoss & Prussen, Luxembourg - Nathalie Dogniez, Partner, KPMG, Luxembourg - Michèle Eisenhuth, Partner, Arendt & Medernach, Luxembourg - Francine Keiser, Of counsel, Linklaters LLP, Luxembourg
15.35 – 16.05	<i>Refreshment break and visit of the exhibition area</i>
16.05 – 16.35	A retrospective of net flows in Luxembourg Funds before, during and after the 2008 crisis François Génaux, member of the ALFI Statistics & Economic Research Committee
16.35 – 17.35	Interview : 2011 and beyond Interviewer: - Yuri Bender, Editor-in-Chief, Professional Wealth Management, London Interviewees: - Jean Guill, Director General, Commission de Surveillance du Secteur Financier, Luxembourg and Member of the Management Board, ESMA - Victor Rod, Director, Commissariat aux Assurances, Luxembourg, and Alternate Chair, EIOPA
17.35 – 17.40	Closing remarks
17.40 – 18.00	<i>Farewell drink</i>

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