

# ALFI Roadshow to the USA

13-16 May 2024

New York and Boston

#ALFIroadshow

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# Boston - Monday 13 May 2024

12.00 - Registration and networking lunch

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12.30 - Welcome address by ALFI

Jean-Marc Goy, Chairperson, ALFI

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12.40 - Key Legal Developments

Struggling to keep up with the latest European legal reforms? Join us for a concise, 30-minute panel discussion on the most pivotal topics, including AIFMD 2, ELTIF, ESG initiatives, the democratisation of private funds, to name a few. Engage with seasoned legal experts who will provide comprehensive insights and actionable takeaways.

**Moderator:** Nicolas Fermaud, Elvinger SARL PLLC

**Panellists:**

Zornitsa Chorbazhiyska, Managing Associate, Linklaters

Kristof Meynaerts, Partner, Clifford Chance

Pierre Zaccuri, Senior Associate, Arendt & Medernach

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13.15 - Operational aspects of Luxembourg funds

The panel of experienced professionals from Asset Management, Banking, and Fund Administration providers will provide their interactive insight into the Operational aspects of executing against an international distribution strategy. What have we learned? Where do we go? What worked and didn't work?

**Moderator:** Jervis Smith, Advisor and Board member, Vistra (Luxembourg) S.à r.l.

**Panellists:**

Christopher McChesney, Managing Director, Brown Brothers Harriman

Rafael Perez, Business Development Lead, Americas, One Group Solutions

Deirdre Ryan, Managing Director, Offshore Business Origination, State Street Bank International GmbH, Luxembourg Branch

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13.45 - Wrap-up and closing remarks

# New York - Thursday 16 May 2024

08.00 - Registration and breakfast

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08.45 - Welcome address by ALFI

Jean-Marc Goy, Chairperson, ALFI

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08.50 - Welcome address by the Consulate General of Luxembourg in New York

Paul Steinmetz, General Consul, Consulate General of Luxembourg in New York

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08.55 - Opening by the Master of ceremony

Nicolas Fermaud, Partner-Head of the New York office, Elvinger SARL PLLC

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09.00 - A global macro-economic view on fund distribution

Daniel Gerard, Senior Multi-Assets Strategist, State Street

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09.10 - Retailisation of PA, reality or hype?

Delve with us into the retailisation of private assets to understand if this trend is a fleeting buzz or a concrete shift in investment strategies. Our engaging session will examine Luxembourg's role in pioneering accessible fund structures for private assets, addressing the changing demands of LPs and the trends we are seeing on the market. We'll discuss the overarching successes and obstacles encountered, and illuminate the regulatory environment influencing Luxembourg's position as a leader in widening the investor base for private markets. Join us for an insightful analysis into how Luxembourg is shaping the landscape for retail investors venturing into private assets, offering a glimpse into the future of global fund distribution.

**Moderator:** Claire Prospert, Partner, Linklaters

**Panellists:**

Steven Greenspan, Global Director of Product Development, J.P. Morgan Asset Management

Jarrett Mellman, Senior Vice President, Fund Management and Reserach, iCapital Network

Cyril Schopfer, Managing Director & Head of CACEIS US, CACEIS Investor & Services Bank S.A.

Stefan Staedter, Partner, Head of New York office, Arendt & Medernach

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10.00 - Illuminating industry insights

Are you losing sleep over pressing industry concerns? ALFI offers a dynamic solution in the form of rapid-fire executive briefings that resemble the efficiency of speed dating. Our briefings are designed to address the questions that keep you awake at night, delivering essential insights on pivotal industry topics. These sessions delve into regulatory nuances and hard-hitting business facts while analysing their direct impact on the business models and value chains of asset managers, management companies, and their products. Our format is crisp and to the point, with a total of 4 briefings, interspersed with engaging Q&A sessions to ensure all your queries are met.

**Moderator:** Serene Shtayyeh, Partner, PwC

**AIFMD II + UCITSD:** Nicolas Fermaud, Partner - Head of the New York office, Elvinger SARL PLLC

**Distribution opportunities and challenges:** Frank van Kuijk, Partner, Loyens & Loeff

**Valuation:** Rafael Perez, Business Development Lead, Americas, One Group Solutions

**Sustainability:** Maren Stadler-Tjan, Partner, Clifford Chance

Joshua Goldman, Senior Vice President, Blackstone

Adam King, Principal, KKR

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10.40 - Coffee break

# New York - Thursday 16 May 2024

## 11.10 - Update from the regulators

Supervisory authorities play a crucial role in maintaining and promoting a welcome sense of order. Robert Shapiro from the SEC and Marco Zwick from the CSSF will talk about the expectations of the institutions they represent, share their key priorities, discuss opportunities and hot topics of significant focus for both regulators such as AML/CFT, operational resilience, liquidity risk management, sustainable finance, .... to name a few.

**Interviewer:** Jean-Marc Goy, President, ALFI

### Interviewees:

Robert Shapiro, Assistant Director, Investment Management Division, US Securities and Exchange Commission

Marco Zwick, Director, Commission de Surveillance du Secteur Financier (CSSF)

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## 11.45 - Operational aspects of Luxembourg funds

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**Moderator:** Jervis Smith, Advisor and Board Member, Vistra (Luxembourg) S.à r.l.

### Panellists:

Eduardo Gramuglia Pallavicino, CCO (ad interim) & Benelux Head of Securities Services, Citibank Europe plc, Luxembourg Branch

James Hays, Partner, Gibson, Dunn & Crutcher LLP

Jarrett Mellman, Senior Vice President, Fund Management & Research, iCapital Network

Rakesh Patel, Vice President, Goldman Sachs Asset Management

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## 12.25 - Master of ceremony's wrap-up and closing remarks

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## 12.30 - Networking lunch

