



05
02
2019

**Barron's
Institutional
Summit**
New York City



THURSDAY, MAY 2ND

- 8:00 am - 5:00 pm Registration
- 8:00 am - 9:00 am Breakfast
- 9:00 am - 9:50 am Top Trends & New Business Strategies for 2019 ^{I-W}
Keith Tanabe, Bank of America Merrill Lynch
Kristina Van Liew, Graystone Consulting, a business of Morgan Stanley
Moderator: Mark Barnum, Managing Director of Investments, UBS
Financial Services Inc.
- 9:50 am - 10:30 am Asset Allocation and the Opportunities and Challenges of Secular Risk ^{CFP | I-W}
Ira W. Carnahan, CFA, Portfolio Specialist, U.S. Equity, T. Rowe Price
Sebastien Page, Head of Global Multi-Asset, T. Rowe Price
Moderator: Laura Kane, Executive Director of Investment Strategy, UBS
Wealth Management Research - Americas
- 10:30 am - 11:00 am 5 Critical Issues Facing Institutional Investors & Advisors Today ^{CFP | I-W}
Robert Smith, President & CIO, Sage Advisory Services
- 11:00 am - 11:15 am Refreshment Break
- 11:15 am - 12:05 pm Process & Efficiency: How to Scale Your Business & Build Your Practice
Jim Detterick, Graystone Consulting, a business of Morgan Stanley
Ira Rapaport, New England Private Wealth Advisors, LLC
Moderator: Eileen Pickard, Head of Global Institutional Consulting,
Bank of America Merrill Lynch
- 12:05 pm - 12:45 pm Navigating International Debt Amidst Changing Monetary Policy & Trade ^{CFP | I-W}
Hemant Baijal, Co-Head of the Global Debt Team and Portfolio Manager,
OppenheimerFunds
- 12:45 pm - 1:55 pm **LUNCH**



ADVISOR

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THURSDAY, MAY 2ND

- 1:55 pm - 2:45 pm Innovations in Institutional Client Service
Chad Pigg, Bank of America Merrill Lynch
Rick Van Kuren, LVW Advisors
Moderator: Jodie Gunzberg, Managing Director, Chief Investment Strategist,
Graystone Consulting, A Business of Morgan Stanley
- 2:45 pm - 3:15 pm Enhancing Portfolio Performance with Gold **CFP | I-W**
Joe Cavatoni, Managing Director, World Gold Council
- 3:15 pm - 3:30 pm Refreshment Break
- 3:30 pm - 4:10 pm Investment Trends in the Institutional Market **CFP | I-W**
Karl Dasher, CEO North America & Co-Head of Fixed Income, Schroders
Nanette Abuhoff Jacobson, Managing Director & Multi-Asset Strategist,
Wellington Management Company LLP, Global Investment Strategist for
Hartford Funds
Moderator: Ron Insana, Financial Journalist, Senior Advisor to Schroders
- 4:10 pm - 5:00 pm Corporate Innovation and Exponential Organizations
Pascal Finette, Chair for Entrepreneurship & Open Innovation,
Singularity University
- 5:00 pm - 6:00 pm Cocktail Reception