



CBBA-Europe Annual Conference

The New Social and Employee Benefits' Environment between Challenges & Innovation

Résidence Palace, 155 rue de la Loi, 1040 Brussels

Agenda November 13th: Pensions & Investments

08:30-09:00	Registration and welcome coffee
09:00-09:10	<p style="text-align: center;"><u>OPENING</u></p> <p>Olga Ruf-Fiedler, President of the Cross-Border Benefits Alliance – Europe (CBBA-Europe)</p>
09:10-10:15	<p><u>CROSS BORDER COMPANIES' PENSIONS: WHY YES? WHY NOT? Or WHY "NOT YET"?</u></p> <p>The floor to Companies' HR representatives and to some leading providers about their experience and attitude towards corporates' cross border pension solutions.</p> <p><u>Introduction to the session:</u> Jacqueline Lommen, State Street Global Advisors, Senior Pensions Strategist</p> <ul style="list-style-type: none"> • Birgit Kohnen, Global Rewards, JT International SA • Sasha Jauregui, Total Rewards EMEA, Logitech • Cesare Rovelli, Head of HR, Organization and IT, Versalis International (ENI group) • Sjuck de Bordes, Compensation & Benefits Leader Europe at Owens Corning • Martel Neville, Senior Manager, International Benefits Comcast – NBCUniversal- <p><u>Moderator:</u> Jacqueline Lommen, Senior Pensions Strategist, State Street Global Advisors</p>
10:15-10:55	<p><u>THE NEW PENSION DESIGN IN THE CURRENT WORLD: SOME INNOVATIVE PERSPECTIVES</u></p> <p>In a changing World made up of new challenges and opportunities, innovation should represent the key for an ideal pension design for the future</p> <p style="text-align: center;"><u>Round table (part 1: pay-out and investments)</u></p> <ul style="list-style-type: none"> • Maiyuresh Rajah, Senior Investment Strategist, State Street Global Advisors • Pablo Antolin, Head of Private Pensions, OECD • <u>Moderator:</u> Christian Lemaire, Global Head of Retirement Solutions, Amundi
10:55-11:25	Coffee break
11:25-12:05	<p style="text-align: center;"><u>Round table (Part 2: technological information tools and guarantees)</u></p> <ul style="list-style-type: none"> • Martino Braico, Senior Manager of Prevnet and Vice President of CBBA-Europe • Antonio Napolitano, Head of Product Development, Fidelity International <p><u>Moderator:</u> Carlo Svaluto, Senior Staff Writer, Investment and Pensions Europe (IPE)</p>

12:05-12:35	<p align="center"><u>THE ONGOING AND FUTURE INITIATIVES OF EIOPA ON PRIVATE PENSIONS</u></p> <p align="center"><u>Key note speech</u> from Fausto Parente, Executive Director, the European Insurance and Occupational Pensions Authority (EIOPA)</p>
12:35-13:35	<p align="center">Lunch break</p>
13:35-14:20	<p align="center"><u>WILL THE IORP 2 DIRECTIVE REALLY EASE THE CROSS BORDER OCCUPATIONAL PENSIONS?</u></p> <p align="center">One of the declared aims of the new IORP Directive is to ease the cross-border activities of pension funds. But will it really achieve this goal?</p> <p align="center">Round table:</p> <ul style="list-style-type: none"> • Hans van Meerten, Professor at the University of Utrecht and member of the OPSG of EIOPA and member of the Scientific Council of CBBA-Europe • Thierry Verkest, United Pensions and Partner at Aon Retirement Solutions • David Powell, Principal, Groom Law Group • Nico Spiegel, Legal Officer, DG Financial Stability, Financial Services and Capital Markets Union, European Commission <p><u>Moderator:</u> Francesco Briganti, Secretary General of CBBA-Europe</p>
14:20-15:05	<p align="center"><u>THE NEW PAN-EUROPEAN PERSONAL PENSION PRODUCT (PEPP): A PROMISING INITIATIVE BUT WILL IT REALLY WORK?</u></p> <p align="center">The new EU Regulation providing for a pan-European Personal Pension Product (PEPP) seems to be a very promising tool that might open up the EU market to new opportunities for providers, consumers and financial markets. But will it really work?</p> <p align="center">Round table:</p> <ul style="list-style-type: none"> • Bernard Delbecque, Director for Economics and Research at the European Fund and Asset Management Association (EFAMA) and Chair of the OPSG of EIOPA • Simone Miotto, Senior Policy Adviser at PensionsEurope and member of the EIOPA's Expert Practitioner Panel on PEPP • Ambrogio Rinaldi, Director at COVIP (Italian supervisory authority on pension funds) and Chair of the OECD Working Party on Private Pensions <p><u>Moderator:</u> Christian Lemaire, Global Head of Retirement Solutions, Amundi</p>
15:05-15:20	<p align="center"><u>Know Your Client: Leveraging Natural Behavior for a Competitive Edge</u></p> <p align="center">Monique Lung, President, Conversation Artistry. Coach and Provider of DNA Behavior technologies</p>
15:20-15:40	<p align="center">Coffee break</p>
15.40-16.00	<p align="center"><u>SUSTAINABLE FINANCE, ALTERNATIVE AND ESG INVESTMENTS: WHAT CAN WE REALLY ACHIEVE FROM SUCH NEW EU INITIATIVES?</u></p> <p align="center">Sustainable Finance, alternative and ESG investments represent today a real priority in the EU agenda. What are their potential and limits? Can really Finance contribute to make better this World, or should it only focus on its natural goal, as to say on making as more money as possible?</p> <p align="center"><u>The role of Venture Capitals in China in Benefiting the Local Economy</u> Chengsen Yeh, ZiAsset Consulting Services Limited</p> <p align="center"><u>Round Table: The potential virtuous synergy between investors and institutions and the new trends of institutional investors towards alternative and ESG</u></p>
16.00-16.50	<ul style="list-style-type: none"> • Alessandra Franzosi, Head of Pension Funds & Asset Owners - Capital Markets at London Stock Exchange Group • Nicolas Firzli, General Director of the World Pension Forum • Sergio Carfizzi, General Director of BCC Pension Fund of Cooperative Banks • Laura Merlini, Managing Director EMEA for the Chartered Alternative Investment Analyst (CAIA) Association <p><u>Moderator:</u> Marisol Hernandez, Asset Owners, Alternatives Principles for Responsible Investment (PRI), Senior Manager</p>
16:50-17:00	<p align="center"><u>CONCLUSIONS OF THE DAY</u></p> <p align="center">Francesco Briganti, Secretary General of CBBA-Europe</p>

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