



**Thursday, June 27, 2019**  
12:15 pm – 5:00 pm

**CONRAD HOTEL**  
950 New York Avenue, NW  
Washington, D.C. 20001



## ***Facing and solving the challenges of cross border benefits in Europe for multinational corporations***

**12:15 pm**    **Welcome Lunch**

**1:00 pm**    **Introduction**

**Olga Ruf-Fiedler**, president, Cross-Border Benefits Alliance – Europe (CBBA-Europe), **David Powell**, principal, Groom Law Group and **Richard Hinz**, senior advisor, American Benefits Council

**1:15 pm**    **Regulatory Developments in the European Union Relating to Cross Border Private Pensions (workplace/corporate and individual plans) and the Potential Impact of Brexit.**

**Francesco Briganti**, secretary general, CBBA-Europe

**1:30 pm**    **Session I. Cross Border Pensions: Practical Experiences, Challenges and Opportunities**

*This session will describe the experience of employers and service providers offering cross border pensions in Europe. The discussion will highlight the advantages of these arrangements and remaining obstacles and provide advice on how cross border pensions might be improved.*

### **Part 1. Administration, Innovative DC and case study**

**Dejan Malesic**, head of business development, Previnet

**Olga Ruf-Fiedler**, savings and pensions leader, The Dow Chemical Company and president, CBBA-Europe

**Christian Lemaire**, global head, Amundi Retirement Solutions

Moderator: **Richard Hinz**, senior advisor, American Benefits Council

## **Part 2. Trends in the European Union & in the United States in national and cross border pensions**

**Rob Hummel**, associate partner, Aon Global International Retirement and Investments

**Guy Worsey**, director, customer and distribution management—Americas,  
Zurich Global Employee Benefits Solutions

**Joshua Franzel**, president/ceo, Center for State and Local Government Excellence

Moderator: **David Powell**, principal, Groom Law Group

**3:00 pm**      **Break**

### **3:15 pm**      **Session II. Legacy DB Plan in the UK? You could be closer to fixing the problem than you think**

*New opportunities are emerging to exit schemes cost effectively. This will allow DB pension risk to be removed from the balance sheet once and for all.*

**Steve Geere**, senior partner, Mercer UK

Moderator: **Francesco Briganti**, secretary general, CBBA-Europe

### **3:45 pm**      **Session III. Regulatory Compliance, Portfolio Strategies and Environmental, Social and Governance Investing: National versus Cross Border Considerations**

*Are there differences in investing at a national or at cross-border level? If so, how such different approach might affect regulatory compliance, portfolio strategies and environmental, social and governance investing? Two experts respectively from Europe and the US will discuss these matters.*

**Ken Gulick**, vice president, global benefit solutions, Fidelity Investments

**Jacqueline Lommen**, senior pensions strategist, Northern Europe, State Street Global Advisors

Moderator: **Richard Hinz**, American Benefits Council

### **4:30 pm**      **Session IV. Cross Border Considerations in Health Benefits**

*Healthcare insurance represent one of the most important employee benefits to be offered to employees. This holds even more importantly when those workers and their families are transferred to other Countries. Even if the U.S. and the European healthcare systems are organized very differently, challenges and solutions for mobile workers are quite similar, especially in case of companies' sponsored healthcare benefits.*

**Mohammed Jamil Makhadmi**, B2G business development manager, Cigna North America

**Randy DeFrehn**, DeFrehn and Associates, LLC

Moderator: **David Powell**, principal, Groom Law Group

**5:00pm**      **Closing Remarks**

**To register:**

If you are a member of the American Benefits Council, please send an email to: [ldudley@abcstaff.org](mailto:ldudley@abcstaff.org)

Otherwise send an email to: [info@cbba-europe.eu](mailto:info@cbba-europe.eu)

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