2020 MMI
ALTERNATIVE INVESTMENTS FORUM

Virtual Event Series

AGENDA

Wednesday, July 8, 2020

11:00am – 11:15am

Welcome and Opening Remarks

Arlen Oransky, Senior Vice President, Chief Membership Officer, MMI

Co-Chairs:
Sheila Rapple, Managing Director, Global Head of Investor Services, Private Wealth Solutions, Blackstone
Lina Rubin, Managing Director, Chief of Staff, Wealth Management USA, UBS

11:15am – 11:45am

Opening Executive Roundtable: Alternative Investments in the "New Normal"

To kick off the Forum, co-chair Sheila Rapple hosts a broad-ranging discussion with two industry leaders on the key opportunities and challenges for alternative investments in the current environment. Some of the topics they will tackle:

- High-level trends impacting the business
- How the industry will emerge from the COVID-19 crisis
- Distributing alternative investments to HNW investors – what has changed?
- How the wealth management and alternative investment industries can best support each other

Host:
Sheila Rapple, Managing Director, Global Head of Investor Services, Private Wealth Solutions, Blackstone

Panelists:
Jerry Pascucci, Managing Director, Head of Global Alternative Investment Solutions, UBS Financial Services
Joan Solotar, Senior Managing Director, Global Head of Private Wealth Solutions & External Relations, Blackstone

11:45am – 12:15pm

Surveying the Alternatives Landscape

This session draws on data from MMI's 2020 Retail Distribution of Alternative Investments report to measure the pulse of the alternative investments marketplace across the industry's most important wealth management platforms, examining market share and sales trends in both the traditional and liquid segments of the market. Key topics will include:

- Secular and emerging product and distribution trends
- Private equity's COVID-19 problem (and opportunity)
- Making hedge funds relevant again
- The industry's path forward in a reimagined market and operating environment

Money Management Institute

Speaker:
Patrick Newcomb, Director of BenchMark Research, FUSE Research Network

Wednesday, July 15, 2020

11:00am – 11:30am

The Importance of Advisor Education

While financial markets have evolved dramatically over the years, the way many advisors learn about them has not. Traditional financial education methods not only struggle to keep pace with the rate of industry change but are generally significantly less effective during periods of severe disruption such as the one we are currently facing. This panel brings together participants from across the industry to discuss the developments and challenges in advisor education, as well as strategies to provide timely and relevant information on alternative investments in this time of unprecedented uncertainty.

Moderator:
Aaron Filbeck, Associate Director, Content Development, CAIA

Panelists:
Brendan Conway, Vice President, Private Wealth Solutions, Blackstone
Tim Maurer, Director of Advisor Development, Buckingham Strategic Wealth
Andrew Smith Lewis, Chief Innovation Officer, CAIS

Wednesday, July 22, 2020

11:00am – 11:30am

Private Assets: What are the Opportunities and Risks Today?

A panel of investment experts shares their views on the private markets in the current environment. Hear how some of the largest wealth management firms and institutional investors view the opportunities and risks in private equity, credit, real estate, and real assets. Among the key topics to be discussed:

- How has COVID-19 impacted the private markets?
- How does this downturn in the cycle compare to prior cycles?
- Where do investors see the best opportunities and biggest risks in private markets today?
- Are investors increasing or decreasing their exposure to private markets?

Moderator:
Bill Stout, Senior Managing Director, Head of Alternative Investments Business Development, Nuveen

Panelists:
Marc deBree, Head of Real Estate and Alternatives, TIAA General Account Organization
Michelle Morris, Executive Director, Alternative Investments, Wealth Management, Morgan Stanley

Kevin Winters, Executive Vice President, PIMCO

Wednesday, July 29, 2020

11:00am – 11:30am

Roundtable Discussion: Market Dislocation Opportunities

The global pandemic has brought complicated investment challenges, but also opportunities. This session explores the current investment landscape and outlook with experts representing some of the largest alternative asset managers. The panel will share perspective on:

- Where the opportunities lie today
- Ways in which those opportunities are being implemented
- Where capital is moving from a geographic and sector standpoint
- How that capital is being put to work

Moderator:
Raelan Lambert, Global Head of Alternatives, Mercer

Panelists:
John Barbo, Head of Global Bank Platforms, Apollo Global Management
David Levenson, Managing Partner, Brookfield Asset Management
Dan Maccarrone, Managing Director, Co-Head of the Global Investment Manager Analysis Team, Morgan Stanley Wealth Management

Wednesday, August 5, 2020

11:00am – 11:30am

The Democratization of Alternatives

Alternative investment strategies previously reserved for institutions and the wealthiest investors are increasingly being made available across retail channels via liquid alternatives, a new generation of non-traded REITs (NTRs), and interval funds as well as via alternative investment platforms which streamline access to illiquid offerings. This panel will discuss the current state of these offerings with a focus on identifying the most salient distribution opportunities. Topics will include:

- The build-out, current state, and future opportunity for liquid alternatives
- Increased use of the interval fund structure amidst challenges to growth for non-traded products
- Due diligence and home-office perspectives on alternative investments, including NTRs and interval funds
- The use of alternative investment platforms to distribute alternative products

Moderator:
Kelly Ye, Director of Research, IndexIQ

Panelists:
Eileen Duff, Managing Partner, Head of Investment Product Development & Origination, iCapital Network
Phil Huber, Chief Investment Officer, Savant Wealth Management
Jeff Taylor, Chief Operating Officer, Black Creek Group