

TOAP Summit 2017 : Driving Change - The Empowerment of the Filipino

Tentative Program & Invited Speakers

Day 1: The Philippine Pension System, Tuesday, October 17, 2017

Time	Topics	Speakers
8:00	<i>Registration</i>	
9:00	Welcome Remarks	Rafael G. Ayuste, Jr. President Trust Officers Association of the Philippines
9:10	Keynote Speaker: The Challenges Ahead	Chuchi G. Fonacier Deputy Governor Bangko Sentral Ng Pilipinas
9:40	Multipart Pension System: Surviving the Retirement Years	Michael V. Ferrer Group CEO, ATR Asset Management Edwin Pineda Economist, University of Asia & the Pacific
10:20	The Relevance of PERA: Making PERA Work	Anna Tan-Cimafranca Director Bangko Sentral ng Pilipinas
11:00	<i>Coffee and Refreshment Break</i>	
11:15	The Value & Continuing Relevance of the Social Security System	Emmanuel F. Dooc President Social Security System
11:55	Panel Discussion : Analysis of the Pension System Moderator: Patrick Cheng , SVP & Trust Officer, CBC Discussants : Emmanuel F. Dooc, Anna Tan-Cimafranca, Michael Ferrer, and Ador A. Abrogena , EVP, BDO Universal Bank and Atty. Ma. Paz Agojo-Garcia , BPI AMTCorp.	
12:35	<i>Lunch</i>	
1:35	Making Investments Relevant to Every Juan: e-KYC	Gagan Rai Managing Director & CEO NSDL eGovernance Infrastructure Ltd.
2:15	Philippine Corporate Pension: Challenging Broad Market Implementation	Ramon B. Segismundo President People Management Association of the Phils.
2:55	Individual Provident Fund Systems Elsewhere in Asia: What Has Worked and What to Consider	Dioscoro Ramos Director BDO Universal Bank, Inc.
3:35	<i>Coffee and Refreshment Break</i>	
3:50	Understanding and Managing the Psychology of Millennials: Making Retirement Relevant to the Millennials	Stuart Jamieson Managing Director The Nielsen Company (Philippines), Inc.
4:30	Passion For People: Unraveling the Truth Behind “People as the Company’s Biggest Asset”	Mailyn P. Borillo President OSM Maritime, Inc.
5:00	Panel Discussion : The Baby Boomer as Retiree – A Forgotten Generation? Moderator : TOAP Director Antonio Danao Discussants : Gagan Rai, Ramon B. Segismundo, Dioscoro Ramos, Stuart Jamieson, Mailyn Borillo, Josephine Cervero , Trust Officer, Land Bank of the Philippines	
5:30	<i>End of Day 1 Program</i>	

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Day 2: CISL : The Equalizer, Wednesday, October 18, 2017

Time	Topics	Speakers
8:00	<i>Registration</i>	
9:00	Welcome Remarks	Atty. Ma. Paz Agojo-Garcia TOAP Vice-President & Director, Taxes & Regulated Products
9:10	Keynote Speaker: Investment Driven Change	Teresita J. Herbosa Chairperson Securities & Exchange Commission
9:40	Healthier & Wealthier: The Unaccounted Investment Plan	Dr. Didoy Lubaton Natural & Holistic Doctor, Motivational Speaker, Health Author
10:10	CIS in Wealth Management : Experience From Across The Region.	Michael Stanhope Founder & CEO Hubbis
11:00	<i>Coffee and Refreshment Break</i>	
11:15	CISL: The Management of CIS	Deanno J. Basas President Fund Managers Association of the Philippine
11:45	CISL: View on the Ground - The Distribution of CIS	Valerie N. Pama President Sun Life Asset Management Company, Inc.
12:15	<i>Lunch</i>	
1:15	The Next Lap in Investment & Insurance	Martin Wong CEO Jardine Lloyd Thompson PCS Pte Ltd
1:45	UCITs & ETFs: An Alternative Fund Selection Criteria for FOF	Jean Louis Nakamura Chief Investment Officer Lombard Odier
2:15	Panel Discussion : The CISL Effect Moderator: TOAP Director Robert Ramos Discussants : Deanno J. Basas, Valerie N. Pama, Martin Wong, Jean Louis Nakamura, Josefina Tuplano , EVP, Metropolitan Bank & Trust Company and Fritz Ocampo , SVP, BDO Universal Bank	
2:45	<i>Coffee and Refreshment Break</i>	
3:00	Transparency as the New Norm in the Trust & Offshore Industry: Automatic Exchange of Information & The Common Reporting Standards	Sebastien Hayoz Client Services Director Asiaciti Trust Singapore Pte Ltd
3:30	The Philippine Participation: Automatic Exchange of Information & The Common Reporting Standards	Ryan L. Tanbengco Economist, International Finance Group Department of Finance
4:00	The Philippine Implementation: Automatic Exchange of Information & The Common Reporting Standards	Marissa O. Cabrerros Assistant Commissioner Bureau of Internal Revenue
4:30	Robo Advisory and Cryptocurrency to Chatbots: Disruption and Innovation at its Finest	Akash Anand Chief Marketing Officer, Global Head-Sterategy & Sales Credence Analytics (I) Private Limited
5:00	Technologies 3.0: Transformational Intelligence	Jaideep Billa CEO, iWealth, Intellect Vinay Kumar Business Head, iWealth, Intellect
5:30	<i>End of Program</i>	