



CFA Institute



CFA Society  
Philippines

**SECURE YOUR FUTURE NOW,**

**LEARN FROM THE TRUSTED EXPERTS**

**WHO MANAGE YOUR MONEY**

# PHILIPPINE RETAIL INVESTMENT CONFERENCE 2015

**MAY 16, 2015 | 8:00 A.M. – 5:30 P.M.  
SMX TAGUIG CONVENTION CENTER**

## EVENT OVERVIEW

The Philippine Retail Investment Conference is the annual conference of CFA Society Philippines that aims to increase the financial knowledge of the Filipino individual investors. With the theme "Secure Your Future Now", the conference will highlight the key principles and practices that will help individual investors successfully reach their retirement goals. This will be an opportunity for retail investors to learn from foreign and local industry experts who will share their knowledge, experience, and insights on the following topics:

1. Retirement Essentials
2. Creating a Personalized Investment Policy Statement
3. Frauds, Scams, and Consumer Protection
4. 12 Common Mistakes Investors Make
5. Risk & Return Outlook of Stocks, Bonds, Properties & Private Equity
6. How to Analyze Mutual Funds
7. Preserving Family Wealth through Generations

## MORE INFORMATION

CFA Society Philippines  
(+632) 6365411 loc. 122/125  
[info@cfaphilippines.org](mailto:info@cfaphilippines.org)



Philippine Retail Investment Conference



#PRIC2015



<http://thesocietyevents.wix.com/pric2015>

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## REGISTRATION FEES

EARLY BIRD RATE	PHP1,900.00 (UNTIL APRIL 25, 2015)
REGULAR RATE	PHP2,500.00 (UNTIL MAY 11, 2015)
STUDENTS/ PROFESSORS RATE	PHP800.00

## FEATURED SPEAKERS



**Mr. Mike Gerard Enriquez**  
Chief Investment Officer  
Sun Life of Canada (Philippines), Inc.



**Mr. Nori Poblador**  
Managing Partner  
Navegar Fund



**Mr. Marvin Fausto**  
Board Adviser  
CFA Society Philippines



**Ms. Corrie Purisima, CFA**  
Vice President, Industry Relations  
CFA Society Philippines



**Atty. Teresita Herbosa**  
Chairwoman  
Securities and Exchange Commission



**Ms. Noor Quek**  
Managing Director/Founder  
NQ International



**Atty. Prudence Angelita Kasala**  
Deputy Director and Head, Financial Consumers Affairs Group  
Bangko Sentral ng Pilipinas



**Mr. Robert Ramos, CFA**  
Head of the Trust & Investment Services Group  
and Trust Officer  
UnionBank of the Philippines



**Mr. David Leechiu**  
Country Head  
Jones Lang La Salle Leechiu



**Mr. Hans Sicat**  
President and CEO  
The Philippine Stock Exchange, Inc.



**Mr. Joel Litman**  
Managing Director, Chief Investment Strategist  
Valens Securities



**Mr. Robert Stammers, CFA**  
Director, Investor Education  
CFA Institute

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## FEATURED SPEAKERS



**Ms. April Tan, CFA**

Vice President and Head of Research  
COL Financial Group, Inc.



**Mr. Tolmas Wong, CFA**

Director & Head of Private Clients Services Team  
CIMB-GK Securities



**Mr. Jed Sherwin Uy**

Investigation Agent / Agent-in-Charge  
Department of Justice – Office of Cybercrime

## MODERATORS



**Ms. Cristina Arceo, CFA**

Board Adviser  
CFA Society Philippines



**Mr. Gavin Lee, CFA**

Board Adviser  
CFA Society Philippines



**Ms. Salve Duplito, RFP**

Resident Financial Advisor  
ANC On the Money



**Mr. Michael Oyson, CFA**

President and Chief Executive Officer  
BPI Securities



**Ms. Rose Fausto**

Personal Finance Blogger  
The FQ Mom



**Mr. Emmanuel Palacio, CFA**

Analyst / Advisor - Project Finance,  
Syndication and Real Estate  
Alinma Bank



**Mr. Ernesto Francisco, Jr., CFA**

Vice President, Academic Relations  
CFA Society Philippines

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## CONFERENCE PROGRAM

8:00AM	<b>Conference Registration</b>	1:40PM	<b>12 Common Mistakes Investors Make</b> Mr. Robert Ramos, CFA Head of the Trust & Investment Services Group and Trust Officer UnionBank of the Philippines  <i>Moderated by:</i> Mr. Gavin Lee, CFA Board Adviser CFA Society Philippines
9:00AM	<b>Welcome Speech</b> Ms. Corrie Purisima, CFA Vice President, Industry Relations CFA Society Philippines		
9:10AM	<b>Keynote Address</b> Mr. Hans B. Sicat President and CEO The Philippine Stock Exchange, Inc.		
9:30AM	<b>Retirement Essentials</b> Mr. Robert Stammers, CFA Director, Investor Relations CFA Institute  <i>Moderated by:</i> Ms. Cristina Arceo, CFA Board Adviser CFA Society Philippines	2:25PM	<b>Panel: Risk and Return Outlook of Stocks, Bonds, Properties and Private Equity Equities - Philippine Market</b> Ms. April Tan, CFA Vice President and Head of Research COL Financial Group, Inc.  <b>Equities - Global Markets</b> Mr. Joel Litman Managing Director, Chief Investment Strategist Valens Securities  <b>Bonds</b> Mr. Mike Gerard Enriquez Chief Investment Officer Sun Life of Canada (Philippines), Inc.  <b>Real Estate</b> Mr. David Leechiu Country Head Jones Lang La Salle Leechiu  <b>Private Equity</b> Mr. Nori Poblador Managing Partner Navegar Fund  <i>Moderated by:</i> Mr. Michael Oyson, CFA President and Chief Executive Officer BPI Securities
10:15AM	<b>Morning Break</b> (15 mins.)		
10:30AM	<b>Creating a Personalized Investment Policy Statement</b> Mr. Tolmas Wong, CFA Director & Head of Private Clients Services Team CIMB-GK Securities  <i>Moderated by:</i> Mr. Emmanuel Palacio, CFA Analyst / Advisor - Project Finance, Syndication and Real Estate Alinma Bank		
11:25AM	<b>Frauds, Scams and Consumer Protection</b> Atty. Prudence Angelita Kasala Deputy Director and Head, Financial Consumers Affairs Group Bangko Sentral ng Pilipinas  Atty. Teresita Herbosa Chairwoman Securities and Exchange Commission  <i>Moderated by:</i> Ms. Salve Duplito, RFP Resident Financial Advisor ANC On the Money	3:25PM	<b>Afternoon Break</b> (15 mins.)
12:10PM	<b>Lunch Break</b> (1 hr. and 30 mins.)	3:40PM	<b>How to Analyze Mutual Funds</b> Mr. Marvin Fausto Board Adviser CFA Society Philippines  <i>Moderated by:</i> Mr. Ernesto Francisco, Jr., CFA Vice President, Academic Relations CFA Society Philippines
		4:25PM	<b>Preserving Family Wealth Through Generations</b> Ms. Noor Quek Managing Director/Founder NQ International  <i>Moderated by:</i> Ms. Rose Fausto Personal Finance Blogger The FQ Mom
		5:15PM	<b>Closing</b>
		5:30PM	<b>End</b>

\*Conference Program is subject to change without prior notice.