

2024 Summit



Agenda

2.30pm

Registration and networking

3.00pm

Summit opens

Summit Moderator: [John D'Agostino](#)

3.10pm

Welcome from [Sanjiv Sawhney](#), Group CEO at Waystone

3.20pm

Panel 1

How global Investment Managers are scaling their businesses

- Approaches and recent experiences
- AI and its use in the industry
- Predictions for funds in 2024 and beyond

Panelists:

[Michael Fastert](#), Chief Operating Officer and Chief Legal Officer – Alternatives at ALTi

[Mustafa Tayeb](#), Chief Financial Officer at MGG Investment Group

[Aaron Barnes](#), Senior Managing Director and Founding Member of Newmarket Capital

Moderator: [Karen Malone](#), Product Head – Global Administration Solutions at Waystone

3.50pm

Fireside discussion - The ETF Market

Discussion between [John Harrington](#), Global Head of ETF Product at J.P. Morgan Asset Management and [Paul Heffernan](#), Head of Waystone ETFs, on the global ETF market

- Perspectives and outlook on the ETF market
- Growing an ETF business
- Products

4.10pm

Fireside discussion - Legal challenges and sleepless nights: The regulatory landscape for US Private Fund managers in 2024

Discussion between **Rob Kaplan**, Partner at Debevoise & Plimpton and formerly the founding Co-Chief of the Asset Management Unit of the U.S. Securities and Exchange Commission's Division of Enforcement, and **Julie Dixon**, Product Head – Global Compliance Solutions at Waystone

- Update on US Private Fund Rule litigation
- Marketing rule
- SEC exam priorities

Speaker: **Julie Dixon**, Product Head – Global Compliance Solutions at Waystone

4.30pm

Panel 2

Innovation in international distribution channels: How US managers are designing product to maximize international opportunities

- Pre-marketing and marketing into the EU
- Marketing into the UK and update on the UK Overseas Fund Regime
- Connecting with platforms and other intermediaries in the EU
- Product innovation: Long term investment fund vs long term asset fund - who is using these funds and why

Panelists:

David Barnett, Managing Director, Managing Attorney and Chief Compliance Officer at TD Epoch

Hal Liebes, Executive Vice President and Chief Operating Officer at Alger

Rachel Wheeler, Product Head – Regulated Fund Solutions at Waystone

Selma Coffey, Head of Distribution Support and Market Access at Waystone

Moderator: **Daniel Forbes**, Head of Region – North America Client Solutions at Waystone

5.00pm

Keynote discussion – Geopolitical risks

Discussion with **Ed Price**, Non-Resident Senior Fellow at NYU's Center for Global Affairs, and **John D'Agostino**, Summit Moderator on the current and emerging geopolitical risks impacting global markets

5.30pm

Closing remarks

Des Johnson, Group Chief Revenue Officer at Waystone

5.45pm

Networking reception

8.00pm

Event concludes