



Wednesday 8th September
Sofitel St James, London

08:00-08:50	Registration
08:10-08:40	Breakfast Briefing (optional) <i>Limited to 20 delegates</i>
	Understanding the fundamentals of transition management Lachlan French provides a fresh perspective on the fundamentals of successful transition management, focusing on the key elements required to meet a client's objectives. He begins with insights into the various objectives clients give their transition manager, looks into the best approaches to meeting these goals, and concludes with a discussion of the client benefits. Lachlan French , Managing Director, and Co-Head of the Transition Management Europe, Middle East and Asia Team, <i>BlackRock</i>
	Main conference
08:50-09:00	Welcome address Raquel Pichardo-Allison , Editor, <i>Global Pensions</i>
09:00-09:20	GIPS and transitions: Can one size fit all? Considerable demand has been detected for transparency and consistency for client reporting. Similar comparability demands have also been detected for those seeking to appoint a transition manager. Could GIPS or GIPS-like practices and behaviours be the solution? This session will explore these issues. Colin Morrison , Independent Consultant, Member of GIPS Executive Committee and <i>Chair of GIPS Investor Consultant Sub-Committee</i>
09:20-09:40	Case study session Mark Dwyer , Managing Director and Head of EMEA, <i>Mellon Transition Management</i>
09:40-09:50	New Research Spotlight: How ETFs are being used in transitions Deborah Fuhr , Managing Director, Global Head of ETF Research and Implementation Strategy, <i>BlackRock</i>
09:50-10:00	Questions
10:00-10:35	Panel: Evaluating success through performance measurement How can pension funds compare the track record of Transition Managers and measure success? Is implementation shortfall the best way? Chair: Raquel Pichardo-Allison , Editor, <i>Global Pensions</i> Panellists: Colin Morrison , Independent Consultant, Member of GIPS Executive Committee and <i>Chair of GIPS Investor Consultant Sub-Committee</i> Andrew Williams , Principal, <i>Mercer Sentinel®</i> Rick Di Mascio , Chief Executive Officer, <i>Inalytics Limited</i> Chris Adolph , Head of Transition Management – EMEA, <i>Russell Investments</i> Steve Webster , Head of European Transition Management Sales, <i>Credit Suisse</i> Mark Dwyer , Managing Director and Head of EMEA, <i>Mellon Transition Management</i>
10:35-10:55	Coffee and networking
10:55-11:15	Best practice for undertaking due diligence to effectively choose a transition manager Why a careful and thorough selection process is necessary to maximise the chances of a well managed, cost effective transition. This session will examine the most relevant factors to consider when evaluating transition managers, including the benefits and pitfalls of cost estimates. Andrew Williams , Principal, <i>Mercer Sentinel®</i>
11:15-11:35	Deciding on the most beneficial transition management arrangement Deciding on an exclusive transition manager, a panel of transition managers or an open tender for each transition management exercise all have pros and cons. This session will examine the suitability / appropriateness of various arrangements Rick Di Mascio , Chief Executive Officer, <i>Inalytics Limited</i>
11:35-11:55	Uncovering hidden costs within transition and how these costs may be mitigated Understanding the cost and risk implications of transition management, such as trade, brokerage and foreign exchange, is key to sound decision-making. Hidden costs may well outweigh upfront expenses such as fees and impact on transition service choices. Chris Adolph , Head of Transition Management – EMEA, <i>Russell Investments</i>

Programme continued below

11:55-12:15	<p>Clear communication for optimal client reporting Transitions can involve complex portfolio restructures and include multi-dimensional risk mitigation strategies. Comprehensively reporting on strategy and results is vital to good working relationships between investors and clients. Proven, effective methods of communication between clients and managers will be discussed. Steve Webster, Head of European Transition Management Sales, <i>Credit Suisse</i></p>
12:15-12:30	Questions
12:30-13:35	Lunch and networking
13:35-13:55	Understanding the importance and impacts of technology and algorithms in transition management
13:55-14:15	<p>Meeting investment objectives through fixed income approaches to trading Explaining and discussing the issues that fixed income mandates bring. Rick Boomgaardt, Managing Director, Head of EMEA Transition Management State Street Global Markets</p>
14:15-14:35	<p>Case Study: Choosing a panel of Transition Managers Why Blue Sky Group have a panel of Transition Managers and the decision-making process behind how the panel was selected Ramon Tol, Fund Manager – Equities, <i>Blue Sky Group</i></p>
14:35-14:50	Questions
14:50-15:10	Coffee and networking
15:10-15:30	<p>Update on the latest risk management strategies within transition Risk management in transitions has evolved significantly in recent years. This talk will review how risk management techniques have changed over time and current optimisation techniques for trading and systems and methodology for monitoring risk real time. Michael Gardner, EMEA Head of Transition Management, <i>J.P. Morgan Worldwide Securities Services</i></p>
15:30-15:50	<p>T-Charter 2.0 Examining the T-Charter now and moving forward; hopes and expectations, where to next? Martin Mannion, Director – Pensions Finance, Investments and Risk, <i>GlaxoSmithKline and Chairman of the T-Charter</i></p>
15:50-16:00	Questions
16:00-16:35	<p>Panel: The Evolution of the Transition Manager role Chair: Raquel Pichardo-Allison, Editor, <i>Global Pensions</i> Panellists: Rick Boomgaardt, Managing Director, Head of EMEA Transition Management, <i>State Street Global Markets</i> Lachlan French, Managing Director, and Co-Head of the Transition Management Europe, Middle East and Asia Team, <i>BlackRock</i> Michael Gardner, EMEA Head of Transition Management, <i>J.P. Morgan Worldwide Securities Services</i> Martin Mannion, Director – Pensions Finance, Investments and Risk, <i>GlaxoSmithKline and Chairman of the T-Charter</i> Edward Pennings, Senior Managing Director and Head – EMEA Portfolio Solutions Group, <i>State Street</i></p>
16:35-16:40	<p>Closing remarks Raquel Pichardo-Allison, Editor, <i>Global Pensions</i></p>
16.40-17:30	Drinks reception

Please note that this programme may be subject to change.

Register your interest at www.transitionmanagementforum.com