



London

13 October 2021

Park Plaza Westminster Bridge, London

# Agenda

# TSAM London: we're back!



We are excited to welcome the buy-side community, in-person at TSAM London in 2021.

On 13th October 2021, TSAM (The Summit for Asset Management) will bring together leading asset management firms to discuss the latest challenges facing the buy-side community, as well as the evolving technology and regulatory landscape.

Buy-side attendees get complimentary access to all 6 content tracks, as well as networking events, and post-event drinks.

- **ESG**
- **Investment Operations**
- **Data & Technology**
- **Marketing & Client Services**
- **Risk & Performance**
- **Regulations & Compliance**

# Board of Advisory



**Chawki Karam,**  
Head of EMEA Strategy,  
*Aperture Investors*



**Dan Ridler,**  
Managing Director,  
*BCS Consulting*



**Hilda Tingle,**  
Global Head of Digital  
Marketing,  
*BNP Paribas Asset  
Management*



**Jason Mitchell,**  
Co-Head of Responsible  
Investment,  
*Man Group*



**Joe Kavanagh,**  
Head of Performance  
Measurement  
& Risk Analysis,  
*KBI Global Investors*



**Kevin Telfer,**  
Head of Client Support,  
*Aegon Asset  
Management*



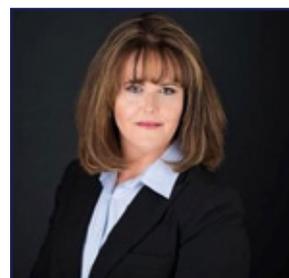
**Mary-Patricia Hall,**  
Data & Reporting  
Manager,  
*Ruffer LLP*



**Nicolas Firzli,**  
Director General,  
*World Pensions Council*



**Paul Taylor,**  
Independent consultant



**Renata Hoes,**  
Consultant, Trainer,  
*Analysis International*



**Sujan Nadarajah,**  
Chief Compliance Officer,  
*TwentyFour Asset  
Management*

# Speakers



**Adrian Clark,**  
Head of Business Risk and Governance, International,  
*RBC Global Asset Management*



**Adam Jacobs-Dean,**  
Managing Director, Head of Markets, Governance and Innovation,  
*AIMA*



**Chris Taylor,**  
Chief Operations Officer,  
*CG Asset Management Limited*



**Angela Greenough,**  
Partner,  
*CMS*



**Ben Mason,**  
Managing Director,  
*BCS Consulting*



**Benedict Kingsmill,**  
Senior Client Partner, Enterprise Financial Services,  
*LinkedIn Marketing Solutions*



**Therese Niklasson,**  
Global Head of Sustainability,  
*Ninety One*



**Camilla Bossi,**  
Business Development Manager,  
*ESG Solutions, Confluence*



**Cheryl Cole,**  
Editor,  
*DiversityQ*



**Daniel Johnson,**  
SVP, Fund Administration,  
*SS&C Technologies*



**Daniel Sandmann,**  
Independent Wealth Manager



**Bruno Maradei,**  
Head of Responsible Investment,  
*Aegon Asset Management*



**Erwin Jager,**  
Manager Data Management,  
*PGGM Investments*



**Glenn Murphy,**  
Chief Operating Officer,  
*Multrees Investor Services*



**David Butcher,**  
Managing Director and Founder,  
*Communications and Content*



**Ilai Schechter,**  
Integration Project Manager,  
*Hurst Point Group*



**Bill Finnegan,**  
Managing Director of Financial Services,  
*Seismic*



**Jarkko Syrila,**  
Head of Public Affairs,  
*Nordea Wealth Management*



**Hugh Burden,**  
Commercial Director,  
*Autorek*



**James d'Ath,**  
Managing Director,  
*Sustainix*



**Jeroen Bruckwilder,**  
Head of Digital Marketing,  
*NN Investment Partners*



**Kate Surala,**  
Chief Compliance Officer,  
*The Analyst Research*



**Julian Samways,**  
Founder,  
*JPES Partners*



**Kyra Brown,**  
Regulatory Development Manager,  
*Aviva Investors*



**Margarita Pirovska,**  
Director of Policy,  
*Principles for Responsible Investment*



**Nicolas Firzli,**  
Director General,  
*World Pensions Council*



**Kate Laing Global,**  
Co-head of Compliance and Head of Compliance,  
*Europe Muzinich & Co.*



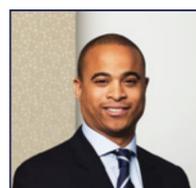
**Mandy Kirby,**  
Chief Strategist and Co-founder,  
*City Hive*



**Marco di Palma,**  
Head of Commercial Operations,  
*JP Morgan Asset Management*



**Natalie Kenway,**  
Global Head of ESG Insight,  
*ESG Clarity*



**Rickie Glasgow,**  
Senior Investment Data Specialist - Global Investment Data Management (GIDM),  
*Vanguard*



**Ritu Shirgaokar,**  
Senior Vice President and Head of Legal,  
*State Street*



**Robert Corbally,**  
COO,  
*Variety Capital Limited*



**Ross Duncton,**  
Managing Director, Head of Marketing & Direct,  
*BMO Global Asset Management (EMEA)*



**Neil Fatharly,**  
Member of Board of Advisors,  
*FSMarTech*



**Simba Mamboinga,**  
Managing Partner,  
*Devlin Mambo*



**Tatjana Greil Castro,**  
Co-Head of Public Markets Portfolio Manager, Global Credit Strategies,  
*Muzinich & Co.*



**Vona Aghoghovbia-Ezichi,**  
Global Director of Accounting - Work Dynamics,  
*JLL*



**Thomas McHugh,**  
CEO,  
*FINBOURNE Technology*



**Vian Sharif,**  
Head of Sustainability,  
*FNZ Group*



**Adam Jacobs-Dean,**  
Managing Director, Head of Markets, Governance and Innovation,  
*AIMA*



**Andrew Milligan,**  
Independent consultant



**Graeme Devlin,**  
Managing Partner,  
*Devlin Mambo*



**Mark Babington,**  
Executive Director, Regulatory Standards,  
*Financial Reporting Council*



**Zeynep Madeiros,**  
Head of Investment Operations Service, Europe,  
*Vanguard*



**Tony Burke,**  
Partner,  
*Helford Capital Partners*



**Tim Arengo-Jones,**  
VP, Head of Account Management, EMEA,  
*Enfusion*



**Gabriel Callsen,**  
Director, Market Practice and Regulatory Policy,  
*International Capital Market Association*



**Ian Robinson,**  
Head of Data Change,  
*Jupiter Asset Management*



**Matt Stevens,**  
Head of Marketing,  
*Consultant*



**Peter Jackson,**  
Chief Data and Analytics Officer,  
*Exasol*



**Stephen Collie,**  
Technical Sales Lead,  
*FINBOURNE Technology*



**Verena Charvet,**  
Specialist Consultant,  
*Merlys Consulting*



**William Pryor,**  
Founding President,  
*Investics Data Services*



**Kroum Sourov,**  
Lead Sovereign ESG Analyst,  
*Candriam*



**Katie Prideaux,**  
Investment Analytics Lead,  
*The Yield Book*



**Emily Prince,**  
CEO,  
*The Yield Book Inc. & Group Director, Fixed Income Analytics, LSEG*



**Yugo Ashida,**  
Head of ISS Enterprise Architecture,  
*Fidelity International*



**Mikkel Bates,**  
Regulatory Manager,  
*FE Fundinfo*



**Nick Silver,**  
Director & co-founder,  
*Climate Bonds Initiative*



**Priya Jadeja,**  
Pre-sales Consultant,  
*Autorek*

## 8:00 - Registration

### 08:55 - Chair's Opening Remarks

#### 09:00 - Opening Keynote:

How is ESG transforming the asset management industry?

Moderator: **Nicolas Firzli**, Director General, [World Pensions Council](#)

Speakers: **Brunno Maradei**, Head of Responsible Investment, [Aegon Asset Management](#)

**Andrew Milligan**, Independent Consultant

**Mark Babington**, Executive Director, Regulatory Standards, [Financial Reporting Council](#)

**Daniel Johnson**, SVP, Fund Administration, [SS&C Technologies](#)

#### 09:45 - FINBOURNE Technology Keynote

Grasping the Nettle: Tackling the data sting

Speaker: **Thomas McHugh**, CEO, [FINBOURNE](#)

## 10:30 - Morning Break

ESG	Investment Operations	Data & Technology	Marketing & Client Services	Regulations & Compliance
<b>11:10 - Chair's Welcome Address:</b> <b>Nicolas Firzli</b> , Director General, <a href="#">World Pensions Council</a>	<b>11:10 - Chair's Welcome Address:</b> <b>Glenn Murphy</b> , Chief Operating Officer, <a href="#">Multrees Investor Services</a>	<b>11:10 - Chair's Welcome Address:</b> <b>William Pryor</b> , Founding President, <a href="#">Investics Data Services</a>	<b>11:10 - Chair's Welcome Address:</b> <b>Tony Burke</b> , Partner, <a href="#">Helford Capital Partners</a>	<b>11:10 - Chair's Welcome Address:</b> <b>Paul Taylor</b> , Independent Consultant
<b>11:15 - Panel Discussion:</b> Implementation of ESG regulations – Practical discussion on how firms can navigate the challenges and deliver success Speakers: <b>Adrian Clark</b> , Head of Business Risk and Governance, International, <a href="#">RBC Global Asset Management</a> <b>Adam Jacobs-Dean</b> , Managing Director, Head of Markets, Governance and Innovation, <a href="#">AIMA</a> <b>Verena Charvet</b> , Specialist Consultant, <a href="#">Merlys Consulting</a> <b>Camilla Bossi</b> , Business Development Manager, ESG Solutions, <a href="#">Confluence</a>	<b>11:15 - Panel Discussion:</b> Cross business collaboration and cross functional alignment – A true reflection of operational harmony Speakers: <b>Kevin Telfer</b> , Head of the Data Management Office, <a href="#">Aegon Asset Management</a> <b>Robert Corbally</b> , COO, <a href="#">Variety Capital Limited</a>	<b>11:15 - Panel Discussion:</b> Focusing on the full data lifecycle – Creating an end-to-end data strategy with all the processes and controls around data governance Moderator: <b>Hugh Burden</b> , Commercial Director, <a href="#">Autorek</a> Speakers: <b>Mary-Patricia Hall</b> , Data & Reporting Manager, <a href="#">Ruffer LLP</a> <b>Rickie Glasgow</b> , Senior Investment Data Specialist – Global Investment Data Management (GIDM), <a href="#">Vanguard</a>	<b>11:15 - Fireside Chat:</b> Digital Engagement throughout the investor lifecycle – Using the right tools and technology to stand out from the crowd Speaker: <b>Ross Duncton</b> , Managing Director, Head of Marketing, <a href="#">BMO Global Asset Management (EMEA)</a>	<b>11:15 - Fireside Chat:</b> Post Brexit regulatory landscape – Divergence and equivalence, where are we now and where to go from here? Speakers: <b>Kyra Brown</b> , Regulatory Development Manager, <a href="#">Aviva Investors</a> <b>Kate Surala</b> , Chief Compliance Officer, <a href="#">The Analyst Research</a> <b>Graeme Devlin</b> , Managing Partner, <a href="#">Devlin Mambo</a>
<b>12:00 - Panel Discussion:</b> Aligning and uptake of ESG data – Utilising it for portfolio scoring, performance measurement and risk analysis Speakers: <b>Simba Mamboinga</b> , Managing Partner, <a href="#">Devlin Mambo</a> <b>Kroum Sourov</b> , Lead Sovereign ESG Analyst, <a href="#">Candriam</a> <b>Katie Prideaux</b> , Investment Analytics Lead, <a href="#">The Yield Book</a>	<b>12:25 - Fireside Chat:</b> Driving down cost while increasing digital capabilities – Transformation done right Speaker: <b>Stephen Collie</b> , Technical Sales Lead, <a href="#">FINBOURNE Technology</a>	<b>12:00 - Presentation:</b> Data management as a business capability – How relevant are your data strategies and is it fit for purpose? Speaker: <b>Erwin Jager</b> , Manager Data Management, <a href="#">PGGM Investments</a>	<b>11:45 - Presentation:</b> Truth about trust in the digital Age: Building long-lasting relationships with new generations of customers Speaker: <b>Bill Finnegan</b> , Managing Director of Financial Services, <a href="#">Seismic</a>	<b>12:00 - Presentation :</b> AIFMD review – How will future changes impact delegation to third countries? Speaker: <b>Renata Hoes</b> , Consultant, Analysis International
<b>12:35 - Panel Discussion:</b> Embarking on your ESG data journey – Establishing global ESG standards, eco labelling of products, green passporting and beyond Speakers: <b>Mikkel Bates</b> , Regulatory Manager, <a href="#">FE Fundinfo</a> <b>Vian Sharif</b> , Head of Sustainability, <a href="#">FNZ Group</a> <b>James d'Ath</b> , Managing Director, Head of Markets, Governance and Innovation, <a href="#">Sustainix</a>	<b>12:50 - Fireside Chat:</b> Governance under the light of operational resilience – What does it mean for senior managers and the wider business? Speaker: <b>Dan Ridler</b> , Managing Director, <a href="#">BCS Consulting</a>	<b>12:30 - Presentation:</b> Automating data integrity – Delivering FinOps excellence in the back and middle-office Speaker: <b>Hugh Burden</b> , Commercial Director, <a href="#">Autorek</a> <b>Priya Jadeja</b> , Pre-sales Consultant, <a href="#">Autorek</a>	<b>12:15 - Fireside Chat:</b> Tips for successful digitalization in distribution Speaker: <b>Matt Stevens</b> , Head of Marketing, <a href="#">Consultant</a>	<b>12:30 – Fireside Chat:</b> Operational resilience and DORA – Understanding regulatory expectation and meeting standards Speaker: <b>Ben Mason</b> , Managing Director, <a href="#">BCS Consulting</a>
<b>12:45 - Fireside Chat:</b> Changing nature and evolution of client – How do you cater for the new generation of investors? Speakers: <b>David Butcher</b> , Managing Director and Founder, <a href="#">Communications and Content</a> <b>Bill Finnegan</b> , Managing Director of Financial Services, <a href="#">Seismic</a>				

## 13:15 - Lunch Break

<b>14:30 - Dialogue:</b> ESG effectiveness and governance: The future of financial markets Speaker: <b>Ritu Shirgaokar</b> , Senior Vice President and Head of Legal, <a href="#">State Street</a> <b>Nicolas Firzli</b> , Director General, <a href="#">World Pensions Council</a>	<b>14:30 - Fireside Chat:</b> How resilient is your business model – Maintaining service levels and capabilities throughout the pandemic Speaker: <b>Chris Taylor</b> , Chief Operations Officer, <a href="#">CG Asset Management Limited</a>	<b>14:30 - Fireside Chat:</b> Importance of a CDO for asset management organizations Speaker: <b>Peter Jackson</b> , Chief Data and Analytics Officer, <a href="#">Exasol</a>	<b>14:30 - Panel Discussion:</b> What is the next move towards bespoke client engagement? – The use of AI and hyper personalisation for client reporting and digital marketing Speakers: <b>Chawki Karam</b> , Head of EMEA Strategy, <a href="#">Aperture Investors</a> <b>Julian Samways</b> , Founder, <a href="#">JPES Partners</a> <b>Neil Fatharly</b> , Member of Board of Advisors, <a href="#">FSMarTech</a>	<b>14:30 - Panel Discussion:</b> EU retail investment strategy – Empowering investors, improving market outcomes and bringing back trust in capital markets Speakers: <b>Jarkko Syyrila</b> , Head of Public Affairs, <a href="#">Nordea Wealth Management</a> <b>Stephane Janin</b> , Head of Global Regulatory Development, <a href="#">AXA Investment Managers</a> <b>Daniel Sandmann</b> , Independent Wealth Manager
<b>15:00 - Panel Discussion:</b> All you need to know about 'Net Zero Asset Managers Initiative' – Taking action to ensure zero emission and steady eco recovery Speakers: <b>Therese Niklasson</b> , Global Head of Sustainability, <a href="#">Ninety One</a> <b>Tatjana Greil Castro</b> , Co-Head of Public Markets Portfolio Manager Global Credit Strategies, <a href="#">Muzinich &amp; Co.</a>	<b>14:50 - Panel Discussion:</b> Building the right processes and capabilities that support our business strategies – Investing in the innovative tools and technology to align your operating model Speakers: <b>Ilai Schechter</b> , Integration Project Manager, <a href="#">Hurst Point Group</a> <b>Tim Arengo-Jones</b> , VP, Head of Account Management, EMEA, <a href="#">Enfusion</a> <b>Zeynep Madeiros</b> , Head of Investment Operations Service, Europe, <a href="#">Vanguard</a>	<b>15:00 - Panel Discussion:</b> Driving real value from your data model – Why data management shouldn't be a tick box exercise. Speakers: <b>Gabriel Calsen</b> , Director, Market Practice and Regulatory Policy, <a href="#">International Capital Market Association</a> <b>Thomas McHugh</b> , CEO, <a href="#">FINBOURNE Technology</a> <b>Ian Robinson</b> , Head of Data Change, <a href="#">Jupiter Asset Management</a>	<b>15:15 - Presentation:</b> Using social media to your advantage – Generate leads, increase engagement and retain clients Speaker: <b>Jeroen Bruckwilder</b> , Head of Digital Marketing, <a href="#">NN Investment Partners</a>	<b>15:15 - Panel Discussion:</b> SFDR – Highlights, challenges and delivery to date: all you need to know to get prepared for the next phase Speakers: <b>Sujan Nadarajah</b> , Chief Compliance Officer, <a href="#">TwentyFour Asset Management</a> <b>Kate Laing</b> , Global Co-head of Compliance and Head of Compliance, <a href="#">Europe, Muzinich &amp; Co.</a> <b>Katie Ryan</b> , Principal Consultant, <a href="#">BCS Consulting</a>
<b>15:45 - Presentation:</b> Developments in sustainable finance around the world – Interpreting disclosures, reporting requirements and taxonomy at a global scale Speaker: <b>Margarita Pirovska</b> , Director of Policy, <a href="#">Principles for Responsible Investment</a>	<b>15:35 - Panel Discussion:</b> Consolidating and managing outsourced relationships for better workflow and transparency front to back Speakers: <b>Marco di Palma</b> , Head of Commercial Operations, <a href="#">JP Morgan Asset Management</a> <b>Angela Greenough</b> , Partner, <a href="#">CMS</a>	<b>15:45 - Presentation:</b> Cloud Migration - Lift and Shift vs. Native Speaker: <b>William Pryor</b> , Founding President, <a href="#">Investics Data Services</a>	<b>15:45 - Fireside Chat:</b> Leveraging AI, digital marketing tools and smart data in a virtual word – Altering the dimensions of sales and client relations for good Speaker: <b>Benedict Kingsmill</b> , Senior Client Partner, Enterprise Financial Services, <a href="#">LinkedIn Marketing Solutions</a>	
<b>16:05 - Closing Speech:</b> Finance, society & sustainability: How to make the finance system work? Speaker: <b>Nick Silver</b> , Director & co-founder, <a href="#">Climate Bonds Initiative (CBI)</a>				

## 16:15 - Afternoon Break

### 17:00 - Closing Keynote

Diversity and Inclusion in asset management – Beyond gender markers, race and ethnicity

Moderator:

**Natalie Kenway**, Global Head of ESG Insight, [ESG Clarity](#)

Speakers:

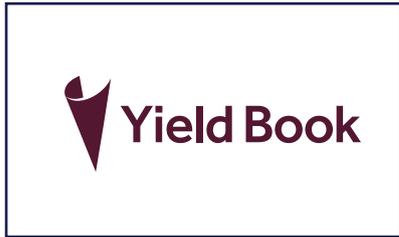
**Vona Aghoghovbia-Ezichi**, Global Director of Accounting, [Work Dynamics, JLL](#)

**Mandy Kirby**, Chief Strategist and Co-founder, [City Hive](#)

**Cheryl Cole**, Editor, [DiversityQ](#)

## 17:45 - Networking Drinks

# Our Partners





# TSAMLIVE

London

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**13th October 2021**  
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**Buy-side professionals qualify for a  
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sessions at TSAM London 2021.**

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