

# BERMUDA EXECUTIVE FORUM MIAMI 2018

INTERCONTINENTAL HOTEL MIAMI DOWNTOWN

Thursday, October 18, 2018 | 8am–7pm



Learn about new opportunities in an ideal jurisdiction for LatAm and global business. Bermuda is a sophisticated, multi-industry financial centre offering an ideal location, world-respected regulation, and top talent across industry sectors. Join our team in Miami for a day of discussion and thought leadership featuring government leaders and regulatory and industry experts across a breadth of business spheres, including re/insurance, asset management, high-net-worth services, family offices, cyber risk and healthcare liability, captive insurance, fintech and digital assets. A free, day-long event offering valuable access, insights and networking opportunities

## AGENDA

8am Registration & breakfast

8:30am **WELCOME**

Sean Moran, Interim CEO | Bermuda Business Development Agency (BDA)

### **OPENING REMARKS**

David Burt, Premier & Minister of Finance | Government of Bermuda

8:45am **OPENING SESSION 1** | *BAYFRONT BALLROOM*

### **SEASIDE CHAT: BERMUDA/MIAMI – SYNERGIES AND STRENGTHS**

A candid conversation between two dynamic leaders, discussing visions for their respective constituencies, as well as the long-standing synergies between Bermuda and Miami—and the many opportunities these offer both jurisdictions

#### Moderator

> Sean Moran, Interim CEO | Bermuda Business Development Agency (BDA)

#### Panel

> David Burt, Premier & Minister of Finance | Government of Bermuda

> Francis Suarez, Mayor | City of Miami



9:15am

**GENERAL SESSION 2 | BAYFRONT BALLROOM**

**CLIMATE AND OCEAN RISKS – IMPLICATIONS AND OPPORTUNITIES**

Bermuda hosted the inaugural Ocean Risk Summit in June 2018, and this panel continues the discussion. Learn how risk prediction, natural infrastructure, insurance and finance industries can mitigate the impacts of climate change and boost resilience in affected coastal communities like Bermuda and Florida

Moderator

- > Chip Cunliffe, Director, Sustainable Development | AXA XL

Panel

- > Niclas Adler, CEO & Founder | SeaHeal
- > Rod Braun, Manager, Climate & Coastal Resiliency Program | The Nature Conservancy
- > Mark Guishard, Director of Corporate & Community Relations, Programme Manager, Risk Prediction Initiative | Bermuda Institute of Ocean Sciences (BIOS)
- > Kristin Jacobs, Executive Director | Resiliency Florida; Member | Florida House of Representatives

10–10:15am

**NETWORKING BREAK**

10:15am

**BREAKOUT SESSIONS 3**

SESSION 3A   BAYFRONT BALLROOM RE/INSURANCE: BERMUDA–FLORIDA SYNERGIES	SESSION 3B   SEVILLA BALLROOM BERMUDA TRUST & PRIVATE-CLIENT SOLUTIONS
<p>Reinsurance leaders discuss the deepening symbiotic relationship between Florida’s domestic insurers and Bermuda’s global reinsurance market</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Shelby Weldon, Senior Vice President   Marsh Management Services, Bermuda; Director   Bermuda Business Development Agency (BDA)</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Albert Benchimol, President &amp; CEO   AXIS Capital</li> <li>&gt; John Huff, CEO   Association of Bermuda Insurers &amp; Reinsurers (ABIR)</li> <li>&gt; John Johnston, CEO Caribbean &amp; Bermuda   Deloitte</li> <li>&gt; Dinos Iordanou, Chair   Arch Capital Group</li> </ul>	<p>How does a leading financial centre like Bermuda tackle the challenges of HNWIs? This panel explores ways Bermuda helps wealthy individuals and families prosper amid regulatory challenges, geopolitical risk, and attacks on traditional notions of privacy</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Keith Robinson, Partner   Carey Olsen Bermuda</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Deanna Didyk, Fiduciary Director, Meritus Trust</li> <li>&gt; Randall Krebs, Director   Harbour International Trust Company</li> <li>&gt; Peter Pearman, Director   Conyers</li> </ul>

11–11:15am

**NETWORKING BREAK**

2 of 7



11:15am **BREAKOUT SESSIONS 4**

<p><b>SESSION 4A   BAYFRONT BALLROOM</b> <b>INSURTECH: A NEW FRONTIER</b></p> <p>A discussion on unique opportunities the Bermuda market offers insurtech companies, and how the island continues innovating to outpace change</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Tom Kelly, Partner   KPMG</li> </ul> <p><u>Panel:</u></p> <ul style="list-style-type: none"> <li>&gt; Dante Disparte, Founder &amp; CEO   Risk Cooperative</li> <li>&gt; Stafford Lowe, COO   DrumG Financial Technologies</li> <li>&gt; Mina Matin, Partner   Norton Rose Fulbright US</li> <li>&gt; Craig Swan, Managing Director, Supervision (Insurance)   Bermuda Monetary Authority (BMA)</li> </ul>	<p><b>SESSION 4B   SEVILLA BALLROOM</b> <b>THE BERMUDA BENEFIT: PRODUCTS AND LIFESTYLE SERVICES FOR HNWIS</b></p> <p>Today’s high-net-worth individuals (HNWIs) have new preferences for investments, assets and properties. This panel of experts from Bermuda’s tourism, real estate, hospitality, private jet and superyacht sectors will highlight how the jurisdiction is adapting to morphing demographics, trends and needs of the ‘Next Gens’</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Glenn Jones, Director of Strategy &amp; Corporate Communications   Bermuda Tourism Authority (BTA)</li> </ul> <p><u>Panel:</u></p> <ul style="list-style-type: none"> <li>&gt; Angela Atherden, Senior Associate   Conyers</li> <li>&gt; Tim Morrison, General Manager   Hamilton Princess &amp; Beach Club</li> <li>&gt; Laura Purroy, General Manager   Hotelco Bermuda Holding/St Regis</li> <li>&gt; Francis Richardson, CEO   Bermuda Shipping &amp; Maritime Association (BSMA)</li> <li>&gt; Mark Soares, Director   Bermuda Yacht Services</li> </ul>
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12–12:15pm **NETWORKING BREAK**



12:15pm **BREAKOUT SESSIONS 5**

<p><b>SESSION 5A   BAYFRONT BALLROOM</b>  <b>LIFE &amp; ANNUITY: BERMUDA’S FASTEST-GROWING RISK-INDUSTRY SECTOR</b></p> <p>Global demand for long-term re/insurance is on the rise, driven by demographic, economic, and behavioural trends. Bermuda is the market-leading hub for life insurance and annuity products via consumer and reinsurance platforms. This panel examines key factors driving that growth, and how buyers of insurance and reinsurance can benefit</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Gokul Sudarsana, Senior Manager   Deloitte</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Brad Adderley, Partner   Appleby</li> <li>&gt; Frank (Chip) Gillis, CEO   Athene Life</li> <li>&gt; Nicola Hallett, Senior Vice President, Client Executive   Marsh Management Services, Bermuda</li> </ul>	<p><b>SESSION 5B   SEVILLA BALLROOM</b>  <b>BERMUDA CAPTIVE INSURANCE: LEADING GLOBAL RISK INNOVATION</b></p> <p>Bermuda is the world’s captive insurance leader. Experts discuss why the island became the global headquarters for self-insurance and how captive structures provide innovative ways to cover new and emerging risks</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Michael Parrish, Senior Vice President and Business Development Lead   Marsh Management Services, Bermuda</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Kathleen Bibbings, Vice President   American International Company Limited (AIG); Chair   Bermuda Insurance Management Association (BIMA)</li> <li>&gt; Matthew Carr, Senior Associate   Appleby</li> <li>&gt; Bron Turner, Senior Manager, Financial Services Audit   KPMG</li> </ul>
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1–2:15pm **BERMUDA KEYNOTE LUNCHEON—“Bacardi: The Road to Bermuda”**  
*BAYFRONT BALLROOM*

1:20pm Welcome remarks  
 Shelby Weldon, Senior Vice President | Marsh Management Services Bermuda; Director | Bermuda Business Development Agency (BDA)

1:30–2pm Keynote  
 Douglas Mello, Managing Director | Bacardi International & Vice President - Corporate Secretary and Shareholder Relations | Bacardi



2:15pm

**BREAKOUT SESSIONS 6**

<p><b>SESSION 6A   BAYFRONT BALLROOM</b>  <b>BEYOND MALPRACTICE: HOW BERMUDA IS MEETING HEALTHCARE LIABILITY CHALLENGES</b></p>	<p><b>SESSION 6B   SEVILLA BALLROOM</b>  <b>BERMUDAS: DOMICILIO DE EXCELENCIA PARA COMPAÑÍAS A NIVEL GLOBAL</b></p>
<p>Bermuda’s insurance market provides a diverse array of healthcare-liability products beyond traditional medical malpractice coverage. Opioids, cyber risk, disaster preparedness—these are challenges Bermuda-based global insurers are tackling for patient-safety professionals and buyers for major hospital systems, long-term care facilities, physicians groups, and health-benefits providers. Learn about dynamic solutions being developed in this fast-evolving space</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Vivienne Moniz, Head of Excess Casualty, Bermuda   AXA XL</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Kirsten Beasley, Head of Healthcare Broking, North America   Willis Towers Watson</li> <li>&gt; Kareen Richardson, Senior Vice President, Bermuda Operations Manager   Integro Insurance Brokers</li> <li>&gt; Oceana Yates, Senior Vice President   Quest Management Services</li> </ul>	<p>Bermuda es un domicilio de excelencia para compañías latinoamericanas y a nivel global, brindando soluciones únicas a las empresas e inversionistas de primera línea. Expertos de habla hispana y portuguesa, en diferentes industrias y con fuertes lazos en toda Latinoamérica, tratarán aspectos relevantes en áreas de mercados de capital, gestión de activos, fondos, fideicomiso y cliente privado, y en especial reaseguros y gestión de riesgos, compañías cautivas de seguro, SPIs y ILS</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Giulianianna Molero Solari, Senior Audit Manager   PwC Bermuda</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Joe Canas, Senior Portfolio Manager   EFG Wealth Management</li> <li>&gt; Federico Candiolo, Chief Counsel Bermuda   Markel CATCo Investment Management</li> <li>&gt; Eduardo Fox, Consultant — Corporate, Private Client &amp; Trusts and Latin America   Appleby</li> <li>&gt; Bartolome Massot, Head of Latin America   Quest Management Services</li> </ul>

3–3:15pm

**NETWORKING BREAK**



3:15pm

**BREAKOUT SESSIONS 7**

<b>SESSION 7A   BAYFRONT BALLROOM</b> <b>RISK OF THE CENTURY: HOW BERMUDA’S GLOBAL INSURANCE MARKET GIVES CRITICAL CYBER COVER</b>	<b>SESSION 7B   SEVILLA BALLROOM</b> <b>SUCCESSION, FACILITATION AND GOVERNANCE FOR FAMILY OFFICES</b>
<p>Cyber threats pose the most critical risks of our time. This discussion focuses on the continued growth and emerging trends of a fast-morphing market, and why Bermuda is best placed to capitalise on coverage. Learn how companies and new products are covering exposures like business interruption, network outages, and security gaps challenging corporations of every size and sector</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Tom Kelly, Partner   KPMG</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Christina Allen, Vice President   Paragon Brokers (Bermuda)</li> <li>&gt; Adam Farrell, Assistant Vice President   Chubb Bermuda Insurance</li> <li>&gt; Michael Murdoch-Smith, Assistant Vice President, Professional Lines   Allied World Assurance Company</li> </ul>	<p>Bermuda has a strong reputation for providing superior service to high-net-worth individuals and families. Experts discuss Bermuda’s unique and comprehensive offering for family offices, encompassing wealth and estate planning, investment management and advice, family governance, insurance and risk management, and charitable trust structuring services</p> <p><u>Moderator</u></p> <ul style="list-style-type: none"> <li>&gt; Sara Schroter Ross, General Counsel   Meritus Trust Company</li> </ul> <p><u>Panel</u></p> <ul style="list-style-type: none"> <li>&gt; Georges Archibald, Head of Americas   Apex Fund Services</li> <li>&gt; Michael Parrish, Senior Vice President and Business Development Lead   Marsh Management Services, Bermuda</li> <li>&gt; Gina Pereira, CEO   Dana Philanthropy</li> <li>&gt; Nir Sadeh, SVP, Head of Private Banking   Butterfield Bank</li> </ul>

4–4:15pm

**NETWORKING BREAK**



4:15pm

**GENERAL SESSION 8: | BAYFRONT BALLROOM**  
**LEVERAGING BLOCKCHAIN TO CHANGE THE WORLD**

Bermuda's fast-emerging fintech platform is transforming the corporate universe, determining who is able to participate in financial systems and how business is done. Panellists discuss future visions for their companies, their experience working with Bermuda, and how the island platform is enabling them to transform the world

Moderator

> Chris Maiato, Principal, Advisory Services | EY Bermuda

Panel

- > Wayne Caines, Minister of National Security, ICT Policy & Innovation | Government of Bermuda
- > Oscar Garcia, CEO | Uulala
- > Alex Gordon-Brander, Founder & CEO | Omega One
- > Bruce Silcoff, CEO | Shyft Network International

5:15pm

**FORUM CLOSING REMARKS**

> Sean Moran, Interim CEO | Bermuda Business Development Agency (BDA)

5:30–7pm

**BDA NETWORKING RECEPTION | POOL TERRACE**