

# BERMUDA EXECUTIVE FORUM NEW YORK 2019

Thursday March 21, 2019 | 8am–7:30pm

Convene at 117 West 46th Street

The logo for the Bermuda Business Development Agency (BDA) features the letters 'BDA' in a large, white, sans-serif font against a dark blue background.

BERMUDA  
BUSINESS  
DEVELOPMENT  
AGENCY

Learn about new opportunities in an ideal jurisdiction for global business. Bermuda is a sophisticated, multi-industry financial centre offering world-respected regulation and top talent across industry sectors. Join us at this forum featuring experts from re/insurance, asset management, high-net-worth services, family offices, long-term life & annuity insurance, captive insurance, insurance-linked securities, and fintech. A complimentary, day-long event comprising thought leadership and networking opportunities that could benefit your business.

## AGENDA

8am Registration & Breakfast

8:25am **WELCOME**

- Andy Burrows, Chief Executive Officer | Bermuda Business Development Agency (BDA)

8:30am **FIRESIDE CHAT WITH PREMIER OF BERMUDA**

### Moderator

- Brian Duperreault, President & CEO, American International Group, Inc

### Panel

- Michael Bloomberg, Founder, Bloomberg LP & Bloomberg Philanthropies
- Premier David Burt, Government of Bermuda

9:15–10:15am **DISRUPTION & OPPORTUNITY: BERMUDA'S IDEAL ADVANTAGE**

Amid fast-changing regulatory and tax-transparency standards and uncertain geopolitical landscapes on both sides of the Atlantic, jurisdictional experts discuss global challenges and opportunities and what Bermuda can offer the world

### Moderator

- Arthur Wightman, Regional Markets Leader, Insurance Leader and Bermuda Territory Leader, PwC, Bermuda

### Panel

- Jeremy Cox, Executive Chair, Bermuda Monetary Authority (BMA)
- Kevin Dallas, CEO, Bermuda Tourism Authority (BTA)
- Curtis Dickinson, Minister of Finance, Government of Bermuda
- Jim Nadler, CEO, Kroll Bond Ratings Agency (KBRA)
- Greg Wojciechowski, CEO, Bermuda Stock Exchange (BSX) | Past Chair, ILS Bermuda | Director, Bermuda Business Development Agency (BDA)

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10:15–11:15am **LOCAL STRENGTH, GLOBAL VALUE: CROSS-SECTOR SOLUTIONS**

Bermuda industry association leaders explore trends and strengths of the island’s collaborative business market, from funds to family offices, and highlight the many strategic advantages the jurisdiction’s breadth of expertise and industries delivers to corporations and investors

Moderator

- Stephen Weinstein, General Counsel, RenaissanceRe | Deputy Chair, Bermuda Business Development Agency (BDA)

Panel

- Craig Bridgewater, President, Alternative Investment Management Association (AIMA) Bermuda
- Nicola Hallett, Executive Member, Bermuda Insurance Management Association (BIMA)
- John Huff, President, Association of Bermuda Insurers & Reinsurers (ABIR)
- Ronald Klein, Senior Advisor, Bermuda International Long-Term Insurers & Reinsurers (BILTIR)
- Keith Robinson, Chair, Society of Trust & Estate Practitioners (STEP) Bermuda

11:15–11:30am **NETWORKING BREAK**

11:30–12:15pm **SESSION 4: CAPTIVE INSURANCE: YOUR COMPANY’S RISK-MANAGEMENT ADVANTAGE**

Emphasizing the many elements that differentiate Bermuda as a blue-chip jurisdiction, this panel covers topics ranging from reasons corporations choose captive insurance, the process to establish this type of self-insurance entity, and why Bermuda is the sensible domicile choice for captives

Moderator

- David Gibbons, Partner, PwC Bermuda

Panel

- Gary Harris, Partner, Appleby Bermuda
- Leslie Robinson, Senior Vice President–Head of Underwriting & Claims, Willis Towers Watson Management (Bermuda)
- Kevin Shea, Director Enterprise Risk Management, FAC Services
- Mekisha Simmons, Principal, Licensing & Authorisations, Bermuda Monetary Authority

12:15–1pm **SESSION 5: RISK SOLUTIONS FOR US HEALTHCARE PROVIDERS**

Bermuda is the market of choice for healthcare liability insurance buyers, thanks to its available capacity, contract certainty, and ability to create new products in response to market needs. Find out why North American hospitals, physicians groups, blood and organ banks, and long-term care facilities are choosing Bermuda for lead and excess layers on their insurance programmes

Moderator

- Amy Wolfinger, Senior Vice President, Aon Bermuda

Panel

- Kim Morgan, Senior Vice President & Healthcare Practice Leader, Sompo International (Bermuda)
- Christopher Parker, Assistant Vice President, Chubb Bermuda
- Ted Schlert, Senior Vice President & Chief Risk Officer, Hackensack Meridian Health

- 1–2:15pm **KEYNOTE LUNCHEON:**  
 “How Millennials Are Redefining Success, Breaking Down Barriers, and Changing The World”
- 1:15pm **Welcome Remarks**
- Stephen Weinstein, Deputy Chair, Bermuda Business Development Agency (BDA)
- 1:20–2pm **Keynote**  
 Jared Kleinert, TED speaker, award-winning author
- 2:15–3pm **SESSION 6: REDUCE LONG-TERM RISK VIA BERMUDA**  
 Bermuda’s life & annuity industry is growing, offering capacity and expertise to jurisdictions worldwide, as populations age and demand for retirement products continues to rise. Supported by responsive regulation, full equivalence with Solvency II, a tax-compliant framework and established P&C reinsurance leadership, the life sector provides vital value to onshore communities
- Moderator**
- Julie McDonald, Senior Manager, KPMG Bermuda
- Panel**
- Chantal Cardinez, Chief Executive Officer, Hannover Re Life
  - Charles Collis, Director, Conyers Dill & Pearman
  - Anup Seth, Managing Director, Aon Bermuda
- 3–3:45pm **SESSION 7: SUCCESS IN ALTERNATIVE ASSETS**  
 Bermuda provides a first-class solution for setting up alternative asset structures. Hear success stories from start-ups and service providers, learn how our regulator works with industry to create business-friendly policy and legislation, and consider audience opinions of essential elements for a winning jurisdiction.
- Moderator**
- Laura Knox Clingerman, Head of Director Services, Wakefield Quinn
- Panel**
- Adam Bathgate, Counsel, Carey Olsen Bermuda
  - Elizabeth Cava, Partner, Deloitte Bermuda
  - David Ferreira, Partner, Owls Nest Partners
  - Melissa Burgess, Assistant Director, Licensing & Authorisations, Bermuda Monetary Authority (BMA)
  - Marc Weaver, Chief Operating Officer, Centaur Fund Services (Bermuda)
- 3:45–4pm **NETWORKING BREAK**

4–4:45pm

**SESSION 8: ILS: EVOLUTION OF “PARTNER CAPITAL”**

The insurance-linked securities market has evolved significantly over the last 20 years, with Bermuda well established as the leading global domicile for facilitation of ILS transactions. This session provides a snapshot of Bermuda’s ILS market, examining its significance, current trends, and future growth

Moderator

- Greg Wojciechowski, Director, Bermuda Business Development Agency (BDA) | CEO, Bermuda Stock Exchange (BSX) | Past Chair, ILS Bermuda

Panel

- Sarah Demerling, Partner, Walkers
- Matthew Feig, Special Counsel—New York; Cadwalader, Capital Markets Group
- Nicolas Pliantios, Senior Vice President, Marsh Management Services (Bermuda)
- Andre Perez, Chief Executive Officer, Horseshoe Group
- Andrew Sagon, Vice President, HSCM Bermuda Funds

4:45–5:30pm

**SESSION 9: INNOVATION ISLAND: BERMUDA’S FINTECH FUTURE**

Bermuda is setting itself apart as a premier jurisdiction for the fintech revolution, thanks to its reputation for world-class regulatory certainty coupled with agile innovation. Industry experts discuss how Bermuda can drive the pace of commercial digitization as technology continues its rapid disruption of global finance

Moderator

- James Ferris, Director, PwC

Panel

- Julian Jacobson, Co-Founder, Velocity Ledger
- Cormac Kinney, CEO, Founder, Diamond Standard Co
- Natalie Neto, Partner, Walkers
- Denis Pitcher, Fintech Technical Consultant, Government of Bermuda

5:30pm

**FORUM CLOSING REMARKS**

- Paul Scope, Chair, Bermuda Business Development Agency (BDA)

5:30–7:30pm

**BDA NETWORKING RECEPTION**

The Gallery, Convene