

BERMUDA EXECUTIVE FORUM: TORONTO 2019

Wednesday, June 19, 2019 | 8am–7:30pm

THE RITZ-CARLTON, Toronto, The Ritz-Carlton Ballroom, 2nd floor

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, fintech and digital assets business. A complimentary, day-long event comprising thought leadership and networking opportunities that could benefit your business.



AGENDA

8am Registration & Breakfast

8:30am **WELCOME**
Andy Burrows, Chief Executive Officer, Bermuda Business Development Agency (BDA)

8:35–9:15am **THE CONVERSATION**
A candid talk between Bermuda's Finance Minister and Canada's Consul General in New York about the island's close historic synergies, global challenges, and future opportunities for bilateral trade and investment

Moderator

- Jessel Mendes, Partner & Regional Growth Markets Leader, EY Bermuda; Director, Bermuda Business Development Agency (BDA)

Panel

- Curtis Dickinson, Minister of Finance, Government of Bermuda
- Phyllis N Yaffe, Consul General of Canada in New York, Consulate General of Canada, New York

9:15–10:15am **SESSION 1: 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

- Patrick Tannock, Managing Director, AXA XL; CEO, Insurance XL Bermuda; Chair, Association of Bermuda International Companies (ABIC)

Panel

- Kevin Dallas, CEO, Bermuda Tourism Authority (BTA)
- Curtis Dickinson, Minister of Finance, Government of Bermuda
- Don Forgeron, President & CEO, Insurance Bureau of Canada
- Shanna Lespere, Chief Operating Officer, Bermuda Monetary Authority (BMA)



10:15–11am **SESSION 2: 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

- Danielle Paynter, VP, Head of Business Development, Butterfield Bank

Panel

- Duncan Card, Senior Partner & Chair, Bermuda & Caribbean Practice, Bennett Jones
- Suzanne Williams-Charles, Director, Association of Bermuda Insurers & Reinsurers (ABIR)
- Oceana Yates, VP/Executive, Bermuda Insurance Management Association (BIMA)

11–11:15am **NETWORKING BREAK**

11:15am–12pm **SESSION 3: LEVERAGING THE TIEA AND BERMUDA INVESTMENT VEHICLE ADVANTAGES**

Bermuda provides a first-class solution for setting up tax-efficient investment structures. Learn how you can put the Canada-Bermuda Tax Information Exchange Agreement (TIEA) to work for your clients. Hear advantages of investment vehicles domiciled in Bermuda and strategies they complement.

Moderator

- Laura Knox Clingerman, Head of Director Services, MQ Services

Panel

- Jennifer Eve, Counsel, Appleby
- Jessel Mendes, Partner & Regional Growth Markets Leader, EY Bermuda; Director, Bermuda Business Development Agency (BDA)
- Joseph Micallef, Partner, Tax-National Tax Leader Financial Services, KPMG Canada
- Tom Rand, Managing Partner, ArcTern Ventures, Toronto and Montreal

12–12:15pm **NETWORKING BREAK**

12:15-1pm **SESSION 4: CAPTIVE SOLUTIONS**

Bermuda is the largest captive insurance market with more than 700 companies writing \$40 billion in annual premium. Learn about the risk-management benefits of self-insuring a variety of risks via a Bermuda-based captive, from employee benefits to cyber disruptions

Moderator

- Janita Burke, Client Director, Eстера Services Bermuda

Panel

- Angela Iannetta, Vice President & Director, Aon Canada
- Jennifer Masters, Manager, PwC Bermuda

- Mekisha Simmons, Principal, Licensing & Authorisations, Bermuda Monetary Authority (BMA)
- Oceana Yates, Senior Vice President, Quest Management Services

1–2:30pm **KEYNOTE LUNCHEON**

1:20pm Welcome Remarks

- Jessel Mendes, Partner & Regional Growth Markets Leader, EY Bermuda; Director, Bermuda Business Development Agency (BDA)

1:30–2pm Keynote

- Lucia Gallardo, Founder & CEO, Emerge

“Future-Proofing Innovation”

The potential for technology to usher in new eras of digital economies, sustained growth and increased equality has been sung for decades. Yet, we still find ourselves facing immense challenges to the future of many societies and the biodiversity that sustains our planet. The way we do business can change that. Rethinking innovation along the interrelated dimensions of profit, people, and planet is already creating viable, sustainable and equitable businesses—while securing our collective future

2:30–3:15pm **SESSION 6: INSURTECH: THE NEW FRONTIER**

Insurtech is developing rapidly and transforming the insurance industry through the use of big data and AI. Hear how Bermuda’s re/insurance market is embracing new regulation and technology to increase underwriting efficiencies and bespoke pricing for global clients

Moderator

- Brett Henshilwood, Partner, Deloitte Bermuda

Panel

- David Edwards, Chief Executive Officer, ChainThat
- Ricardo Garcia, Chief Actuary, Bermuda Monetary Authority (BMA)
- Mitch Ocampo, Head of Studio Innovation Lab, RG&A
- Rebecca Vernon, Counsel, ASW Law

3:15–3:30pm **NETWORKING BREAK**

- 3:30–4:15pm **SESSION 7: THE EVOLUTION OF BERMUDA’S FINTECH ECOSYSTEM**
Bermuda was among the first countries to create a regulatory framework governing digital assets. Panellists discuss what sets Bermuda apart from competing jurisdictions and the island’s attraction to fintech businesses
- Moderator
- Daniel Fuke, Partner, Fasken
- Panel
- Jarrett Abraham, Director of Corporate Development, SALT Lending
 - Aron Dutta, Co-Founder, AMBIKA
 - Chris Garrod, Director, Conyers
 - James Wallace, Co-Founder, Exponential Ventures
- 4:15–5pm **SESSION 8: THE FUTURE OF FINTECH**
As fintech evolves at a breakneck pace, industry experts discuss future visions for their companies and how the Bermuda market provides a perfect platform from which to do global business
- Moderator
- Mark Baker, Senior Advisor, Kroll Bond Rating Agency
- Panel
- Hari Acharya, Chief Operating Officer, CryptoScan
 - Denis Pitcher, Chief Fintech Advisor, Government of Bermuda
 - Amber Scott, Founder, Outlier Canada
 - Bruce Silcoff, Chief Executive Officer, Shyft Network
- 5pm **FORUM CLOSING REMARKS**
Andy Burrows, Chief Executive Officer, Bermuda Business Development Agency (BDA)
- 5:15–7:30pm **BDA NETWORKING RECEPTION**
DEQ Terrace & Lounge, The Ritz-Carlton (lobby level)