



9th Annual Private Wealth Latin America & the Caribbean Forum

October 25-26, 2022 – Miami, Florida

Designed For:

RIAs, private banks, wealth managers, family offices, and consultants.

The forum provides insight into selected areas of interest within the region's wealth management community.

Past Speakers Include:

Thomas Peterffy, *Founder and Chairman, Interactive Brokers*
Orlando Bravo, *Founder and Managing Partner, Thoma Bravo*
Francis Suarez, *Mayor, City of Miami*
Elliot Dornbusch, *Founding Partner & Chief Executive Officer, CV Advisors*
Alexandre Arruda Camargo Silva, *Chief Investment Officer, Finaccess Advisors*
Candice Beaumont, *Chief Investment Officer, L Investments*
Luis Arango, *Head of International Wealth Management, Truist Wealth*
Eduardo Anton, *Head of Portfolio Management US & LatAm, Andbank*
Harvey Spira, *Founder and Managing Director, PresCap Advisors*
Dylan Kremer, *Managing Director, Investment Strategy, Cresset Capital*
Cliff Oberlin, *Founder, Chairman and Chief Executive Officer, Oberlin Wealth Partners*
Jeff Zipper, *Managing Director Investments-Florida, U.S. Bank Private Wealth Management*
Luis G. Ferreira, *Head of Investment Strategy Group, EFG Capital International*
Ruben J. Luna, *Head of Private Banking, Banistmo*
Jose Remy, *Partner, Investment Advisory, Alvarium Investments*
Ricardo Nieto, *Chief Investment Officer, Aragon Capital*
Ahmed Riesgo, *Chief Investment Officer, Insigneo Financial Group*
Joseph Karl, *Chief Investment Strategist, Provenance Wealth Advisors*

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DAY 1 – October 25th, 2022**7:45 Registration & Welcome Coffee****8:25 Host's Welcome****Brett Friedberg, Head of Sales, Markets Group****8:30 Breakfast Presentation***Presenter:***Houston Methodist Global Healthcare Services****9:00 Opening Bell: Asset Allocation and Macro-Economic Outlook for the Next 12 Months**

Despite the deep impact of COVID-19 on the economy overall, investments and the financial markets have grown for the last 12 months. There were substantial changes in the movement of goods, services, and people around the world; the intrinsic characteristics of global markets have allowed economies to endure. For 2022 and beyond, how do our panelists account for these and other factors that could affect their global investment and business decisions related to operating a wealth management organization? Is there a place for thematic investing and how is behavioral and social finance considered? Our panelists will explain how they are putting these very macro and seemingly abstract ideologies into actual practice at the client level.

*Panelists:***Speaker, Managing Director, Smead Capital Management****9:35 Panel: How to Best Take Advantage of Opportunistic Alternative Investments**

The market foresees an abundance of family offices, post-crisis regulation, technological developments, and macroeconomic shifts in demographics and economic policy. In the wake of COVID-19, market volatility is at an all-time high globally. In this, what impacts do our panelists see the virus having on alternative assets in the near future? How are HNW advisors opportunistically looking at expected returns across the alternatives spectrum including private equity, hedge funds, and private debt? What's the role of private debt within a diversified portfolio? Which alternatives will generate meaningful risk-adjusted returns? How are you instilling crisis management and downside protections?

*Panelists:***Russell Deakin, Managing Partner- Director of Investments, Aceana Group****Luciano Lautenberg, Managing Director, Investor Relations, Kawa Capital Management****Speaker, Managing Director, A.R.I.****10:10 Morning Presentation: Private Lending***Presenter:***Daniel Leger, Managing Director, MGG Investment Group****10:30 Morning Networking Break****11:00 Panel: High-Net-Worth Administration and the Future of ESG**

The high-net-worth (HNW) clientele have made environmental, social and governance (ESG) part of private wealth. Private investors, worth \$42 trillion worldwide, could be agents of change on ESG issues. High net-worth family wealth supports the long-term engagement ESG investment will require. But how has ESG worked out in long-term estate and trust planning? Our HNW roundtable will discuss the role of ESG as well as client demand and service.

11:35 Panel - Private Wealth Leadership Roundtable

Despite the difficult economic and health outlook generated by the pandemic, projections for the second half of 2022 were optimistic. What are the current trends, and what services and products are attracting the most interest within the wealth management field? Panelists will discuss the changes they have made and the strategies they have stuck with to better protect their client's money.

12:10 Roundtable Discussions

This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group and informal setting. Each roundtable will have a host and will cover one of the following key areas:

Table 1: Private Lending

Hosted by: **MGG Investments**

Table 2: Healthcare

Hosted by: **Houston Methodist Global Healthcare Services**

Table 3: Gold Equities

Hosted by: **Smead Capital Management**

Table 4: Alternatives

Hosted by: **A.R.I.**

Table 4: Real Estate

Hosted by: **FirstPathway Partners**

12:45 Networking Lunch**1:45 Panel - Maintaining Your Wealth in a Transparent World**

With new tax laws, come different challengers for wealth planners and the impact of CRS and FATCA on Latin American clients is significant. How are wealth planners protecting their clients' assets both in the US, Latin America and the Caribbean? How are clients maintaining their wealth? How are family businesses working on their succession planning using fiduciary structures? With all the transparency, is there any financial privacy left at all?

Panelists:

Speaker, Managing Director, Bridgeford Trust

2:20 Panel - A Broader Discussion on Offshore Jurisdiction Choices for Latin America

It's always important for HNWIs to be aware of all their options and stay current on regulation, structuring, legislation and services for wealth protection and tax efficient planning. What are the offshore jurisdictions of choice for Latin America's HNWI and what differential benefits can they offer?

2:55 Panel - Advanced Asset Allocation Strategies

With competition for clients and assets constantly increasing, wealth management practices need to ensure that their organizational structures, service models, strategies, products, and pricing are positioned to achieve growth, revenue and relationship objectives. Additionally, with the economic strains that come in times of crisis, how are advisors implementing structures to combat downturn, minimize risk, provide tax deductions, and reduce future taxes? Our participants will discuss the changes they have made and the strategies they have stuck with to better protect their client's money.

3:30 Host's Closing Remarks
Brett Friedberg, Head of Sales, **Markets Group**

3:35 Networking Cocktail - *Hosted by:* BNP Paribas Asset Management
Join us for an informal gathering with some of the leading family offices, wealth managers, and private banks in the region to continue the conversations of the day.

4:30 End of Day 1

DAY 2 – October 26th, 2022

8:00 Registration Opens

8:55 Host's Opening Remarks
Brett Friedberg, Head of Sales, **Markets Group**

9:00 Panel - Trends and Opportunities: How can Investors Win in the Latin American Market?
Despite the difficult economic and health outlook generated by the pandemic, projections for 2022 are optimistic. Experts from the US and Latin America will discuss the main sources of investment within their countries, as well as successful wealth management trends. What is the next big opportunity in Latin America and what trends can investors take advantage of to boost re-turns? Which industries and geographies do managers expect to produce the best returns for investors?

9:35 Panel: Fixed Income Realistic Expectations and Ways to Enhance Returns
Bond yields and spreads near historic low levels are currently fueled further by the outbreak of COVID-19. With this coupled with a slow-but-positive growth in the U.S. in comparison to other countries where risk is more prominent, where can opportunities in the fixed income markets today be sought? The aggressive efforts from the Federal Reserve to maintain liquidity run the risks of over-stimulation, and thus, inflation. What is the effect on bonds? With potential in credit markets, the opportunity in the floating-rate sector, the global market focus on politics, policy and crisis management, what role does fixed income play and what is a reasonable yield range to expect out of a balanced portfolio in the near future and long-term? Our panelists will discuss ways to improve returns and the potential risks ahead.

Panelists:

Speaker, Managing Director, **PGIM**

10:10 Networking Break

10:40 Panel: Global and Local Equities and Their Impact on Portfolios

The stock market has stayed consistent and continues to provide strong returns despite the outbreak of COVID-19. However, unlike the housing crisis of 2008, central banks are firm in their stimulus efforts. How are advisors combatting significant downturn and riding the wave of fluctuation? How do advisors navigate slow revenue growth to alleviate the pressure on the equities market? How do different political strategies and shifting economic models affect equity exposure in portfolios? Can Emerging Markets provide equity diversification? Are they still promising? Our expert panel will discuss their outlook on the emerging markets and their short- and long-term impact on equity portfolios.

11:15 Panel: Evaluating Real Assets and Real Estate Investment Strategies

This panel examines the benefits and the drawbacks of real assets and real estate. With the effects of COVID-19, deal volume is lower across international markets. Could stock-market falls push up allocations to real estate? How can HNW investors extract returns from this asset class or how can they use real assets to reduce overall portfolio risk amidst the chaos? How are travel restrictions inhibiting deals? With the economic downturn comes pressure on global oil prices, less demand for natural gas and supply chain disruptions. How are investors incorporating real estate, infrastructure, oil and gas, opportunity zones and commodities into portfolios?

11:50 Roundtable Discussions:

This session is aimed at providing all event attendees with the ability to join in genuine knowledge exchange and discussion in a small group and informal setting. Each roundtable will have a host and will cover one of the following key areas:

Table 1: Family Governance

Hosted by: **Alternative Investment Solutions (AIS)**

Table 2: Wealth Preservation Strategies

Hosted by: **Bridgeford Trust**

Table 3: Insurance

Hosted by: **Advantage Insurance**

Table 4: Real Estate

Hosted by: **PGIM**

Table 5: Credit

Hosted by: **Luciano Lautenberg, Managing Director, Investor Relations, Kawa Capital Management**

12:25 Networking Lunch**1:25 Panel - A Conversation with the Region's Chief Investment Officers and Fund Selectors**

What will wealth management look like in the post-COVID-19 world? How will the next normal impact the way risks are assessed? What does a successful allocation look like and how are these being identified? How are chief investment officers and investment heads interacting with their fund selection teams to create an overall successful portfolio? Investment leaders will discuss their investment outlooks, stories of success and even lessons from failure.



2:00 Panel - Family Office Views on Wealth, Risk and Investments

The geopolitical and financial worlds are changing rapidly and are requiring investors to reassess their allocation strategies. COVID-19 leads to a higher need for risk management. How do supply-chain issues and trading inhibitions affect wealth management moving forward? There has been a rise of investable wealth leading to more single and multi-family offices, along with technological advancements and market disruption. Now, family wealth is focused on preservation rather than growth. How are family offices adjusting their asset allocations and strategies? How are costs adjusted to improve returns? How are family offices managing non-asset allocation investments that are interest-driven by principals and finding that delicate allocation “balance”?

Panelists:

Doug Bryant, President, Settco Management

Speaker, Managing Director, Alternative Investment Solutions (AIS)

Speaker, Managing Director, Advantage Insurance

2:35 Host’s Closing Remarks

Brett Friedberg, Head of Sales, Markets Group

2:40 End of Conference