



Trust Officers Association of the Philippines (TOAP) 2017 TOAP Summit

October 17 & 18, 2017

New World Hotel, Makati, Philippines

In Partnership with

the Fund Managers Association of the Philippines (FMAP) and
the People Management Association of the Philippines (PMAP)

Presents

Driving Change : The Empowerment of the Filipino

**Ms. Chuchi G. Fonacier, Deputy Governor,
Bangko Sentral Ng Pilipinas**

Keynote Speaker: The Challenges Ahead

**Michael V. Ferrer, Group CEO, ATR Asset Management &
Edwin Pineda, Economist, University of Asia & the Pacific**

Multipart Pension System: Surviving the Retirement Years

Anna Tan-Cimafranca, Director, Bangko Sentral ng Pilipinas

The Relevance of PERA: Making PERA Work

Emmanuel F. Dooc, President, Social Security System

The Value & Continuing Relevance of the Social Security System

Panel Discussion : Analysis of the Philippine Pension System

Moderator: **Patrick Cheng**, SVP & Trust Officer, CBC

Discussants : Speakers with **Ador A. Abrogena, EVP, BDO,**
and **Atty. Ma. Paz Agojo-Garcia, BPI AMTCorp.**

Gagan Rai, Managing Director & CEO, NSDL eGovernance Infrastructure Ltd.

Making Investments Relevant to Every Juan: e-KYC

Ramon B. Segismundo, President, People Management Association of the Philippines

Corporate Pension: Challenging Broad Market Implementation

Stuart Jamieson , MD, The Nielsen Company (Philippines), Inc.

Understanding and Managing the Psychology of Millennials:

Making Retirement Relevant to the Millennials

Dioscoro Ramos, Director, BDO Universal Bank, Inc.

Individual Provident Fund Systems Elsewhere in Asia:

What Has Worked and What to Consider

Milyn P. Borillo, President, OSM Maritime, Inc.

Passion For People: Unraveling the Truth Behind

“People as the Company’s Biggest Asset”

Panel Discussion : The Baby Boomer as Retiree – A Forgotten Generation?

Moderator : **Antonio Danao**, TOAP Director

Discussants : Speakers with **Josephine Cervero, Trust Officer, LBP**

Day 1 Program: The Philippine Pension System

Join the 6th edition of the annual TOAP Summit. Connect with Trust practitioners, stakeholders and thought leaders in the engagement of new ideas and issues. Share their ideas, experiences and views on various relevant topics.



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Day 2 Program : The Collective Investment Scheme Law (CISL) : The Equalizer

**Ms. Teresita J. Herbosa, Chairperson,
Securities & Exchange Commission**
Keynote Speaker: Investment Driven Change

**Dr. Didoy Lubaton, Natural & Holistic Doctor,
Motivational Speaker, Health Author**
Healthier & Wealthier: The Unaccounted Investment Plan

Michael Stanhope, Founder & CEO, Hubbis
CIS in Wealth Management : Experience From Across The Region

Deanno J. Basas, President, Fund Managers Association of the Philippine
CISL: The Management of CIS

Valerie N. Pama , President, Sun Life Asset Management Company, Inc.
CISL : View on the Ground - The Distribution of CIS

Martin Wong, CEO, Jardine Lloyd Thompson PCS Pte Ltd
The Next Lap in Investment & Insurance

Jean Louis Nakamura, Chief Investment Officer Lombard Odier
UCITs & ETFs: An Alternative Fund Selection Criteria for FOF

Panel Discussion : **The CISL Effect**, Moderator: **TOAP Director Robert Ramos**
Discussants: **Speakers with Josefina Tuplano, EVP, MBTC & Fritz Ocampo, SVP, BDO**

Sebastien Hayoz , Client Services Director, Asiaciti Trust Singapore Pte Ltd
Transparency as the New Norm in the Trust and Offshore Industry:
Automatic Exchange of Information & The Common Reporting Standards

Ryan L. Tanbengco, Economist, International Finance Group, Department of Finance
The Philippine Participation: Automatic Exchange of Information & The Common Reporting Standards

Atty. Marissa O. Cabrerros, Assistant Commissioner , Bureau of Internal Revenue
The Philippine Implementation: Automatic Exchange of Information & The Common Reporting Standards

**Akash Anand, Chief Marketing Officer, Global Head-Strategy & Sales Credence Analytics (I) Private
Ltd.**

Robo Advisory and Cryptocurrency to Chatbots: Disruption and Innovation at its Finest

Jaideep Billa, CEO, iWealth, Intellect & Vinay Kumar, Business Head, iWealth, Intellect
Technologies 3.0: Transformational Intelligence

To join the Summit, please register by sending the attached registration form to toap1964@gmail.com or fax to 8928035. For inquiries, please call Giselle Quitlong or Marlene Avendano at 894 0542.

For FMAP and PMAP members directly or with your association secretariat.