

MEMO# 32519

June 10, 2020

June 17 ICI Research Committee Video Meeting

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June 10, 2020 TO: Research Committee RE: June 17 ICI Research Committee Video Meeting

ICI Research Committee Video Meeting: June 17, 2020, 11:00 AM (ET) to 2:00 PM (ET)

The ICI Research Committee will be having a video meeting to update committee members on recent policy developments impacting fund and retirement markets, as well as recent research. The meeting will also feature a presentation from Lubasha Heredia, Managing Director and Partner, Boston Consulting Group. Lubasha will share insights into recent developments in the asset management industry, touching on current trends, role of alternative investments, and innovations shaping the industry. The full agenda and registration information is below.

Agenda

11:00 AM - Welcome Remarks and Antitrust Reminder

- Paul Schaeffer, IndexIQ, and Sarah Holden, ICI

11:05 AM to noon - Global Asset Management 2020: Protect, Adapt, and Innovate

- Lubasha Heredia, Managing Director and Partner, Boston Consulting Group will share insights into recent developments in the asset management industry, touching on current trends, role of alternative investments, and innovations shaping the industry. <https://www.bcg.com/publications/2020/global-asset-management-protect-adapt-innovate.aspx>

Noon to 12:30 PM - Lunch/Break on your own

12:30 PM to 1:00 PM - ICI Research Update

- ICI Research staff, Sean Collins and Sarah Holden, will update the committee on recent developments in the fund market and recent research publications.

1:00 PM to 1:45 PM - Washington Update on Retirement and Fund Policy

- ICI Government Affairs staff, Peter Gunas and Allen Huffman, will update the committee on recent developments with policymakers.
- ICI Law staff, Elena Barone Chism, Shannon Salinas, and Matt Thornton, will update the committee on recent developments in regulatory circles.

1:45 PM to 2:00 PM - Discussion of Topics for Future Calls/Meetings**2:00 PM - Adjourn****Registration**

If you would like to register for this meeting, please email Maria Castellon (mcastell@ici.org) to sign up to attend. You will then be sent the information on how to attend the meeting.

We hope you can join us.

Paul Schaeffer
Chairman, Research Committee
IndexIQ

Sarah Holden
Senior Director, Retirement & Investor Research

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