



ROBERT H. SMITH
SCHOOL OF BUSINESS

CFP | CENTER FOR
FINANCIAL POLICY



MUTUAL FUND DIRECTORS FORUM

The FORUM for FUND INDEPENDENT DIRECTORS

The Road Ahead – Disruption and Innovation in the Fund Industry

May 8, 2018

The Smith Suite in the Ronald Reagan Building
1300 Pennsylvania Ave
Washington, DC

- 9:00 – 9:30 Registration/Continental Breakfast
- Welcome
- 9:30 – 10:45 **Charting New Territory: How Emerging Tech Will Change the Fund Industry**
This panel will provide an overview of emerging FinTech issues and how they may be deployed in the fund industry. The discussion will address blockchain as well as machine learning and data science.
- Moderator: Mark Radcliff, DLA Piper
Panelists: Matthew Lodge, Anaconda
 Jib Wilkinson, Deloitte
- 10:45 – 11:15 Break
- 11:15 – 12:15 **Rules, Regs and Robos**
Panelists will provide a big picture view of the development and proliferation of robo-advisers.
- Moderator: Michael Sherman, Dechert
Panelists: Catherine Gordon, Prudential Financial
 Derek Newman, Motley Fool Wealth Management
- 12:15 – 1:45 Lunch
- The Regulatory Perils of Crypto Financing**
John Reed Stark, John Reed Stark Consulting
- 1:45 – 3:00 **Cybersecurity: Chasing a Moving Target**
This panel will explore key cybersecurity issues facing the fund industry.
- Moderator: Stacy Louizos, Drinker Biddle
Panelists: Heather Kaden, Cohen & Steers
 B.J. Kang, FBI WFO Cyber Criminal Intrusion
 Kelly Volz, EY