



the global voice of
the legal profession*



Follow us
[@IBAEvents](#)
[#IBAINvest](#)



INTERNATIONAL BAR ASSOCIATION CONFERENCE 2026

A conference presented by the IBA Asset Management and Investment Funds Committee

35th IBA Global Challenges and Opportunities for the Asset Management Industry Conference

7–9 June 2026, The Ritz-Carlton, Boston, USA

Working programme

WiFi

Network: Ritz-Carlton_Conference

Password: RitzCarlton

Network security cannot be guaranteed; if you access the wifi network you do so at your own risk in accordance with the provider's terms and conditions. Anyone else connected to this network might be able to intercept your personal data.

Headline
conference
sponsor

Harvey

All speaker materials and biographies can be found at www.ibanet.org/conference-details/conf2747

Conference Co-Chairs

Alix d'Anglejan-Chatillon *Stikeman Elliott, Montréal, Quebec; Chair, IBA Asset Management and Investment Funds Committee*
Lora Froud *Macfarlanes, London*

Sunday 7 June

1800 – 2000 **Welcome reception**
The Latern Lounge, Revere Hotel Boston
200 Stuart Street, Boston, MA 02116

Monday 8 June

The sessions will take place in the Ballroom
All breakfasts, breaks and lunches will take place in the Studio and Foyer

0730 – 1745 **Registration**

0730 – 0830 **Continental breakfast**

0825 – 0830 **Welcome from IBA Leadership**

Speaker

Amir Singh Pasrich *International Law Affiliates, New Delhi, Delhi; LPD Secretary-Treasurer / IBA Treasurer, International Bar Association*

0830 – 0845 **Opening remarks**

Speaker

Lora Froud *Macfarlanes LLP, London*

0845 – 0930 **Keynote Speaker**

Interviewer

George Raine *Ropes & Gray, Boston, Massachusetts; Membership Officer, IBA Asset Management and Investment Funds Committee*

Speaker

Robert Almeida *MFS Investment Management, Boston, Massachusetts*

MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

Headline social event sponsors

**Debevoise
& Plimpton**

**ELVINGER
HOSS**
LUXEMBOURG
LAW

L&S

Lenz & Staehelin

**Schellenberg
Wittmer**

Monday continued

0930 – 1015

Channelling distribution channels: The who, what, where of investors and how to access them

- Where do you see your target market/distribution efforts growing and what are the local regulatory hurdles or considerations that either challenge or ease your growth?
- Distribution of retail funds: Are you seeing a market outside the US for US registered funds? Outside Europe for UCITS? Establishing local fund group or relying on private placement?
- Are investors coming to you or are you approaching them and with what types of investments?
- As an access fund/platform provider, what are the advantages and challenges that you see in your distribution relationships? Are fund managers trending towards access fund models?

Moderator

Barbara Cronin *Virtus Investment Partners, Boston, Massachusetts*

Speakers

Katherine Carter Stewart *Dechert, London*

Brian Dillon *Dillon Eustace LLP, Dublin*

Debra Franzese *Willkie Farr & Gallagher, New York*

Kei Ito *Nishimura & Asahi, Tokyo*

Michael Stanton *iCapital, New York*

1015 – 1100

Coffee/tea break

1100 – 1145

Product innovation for private market strategies: Diversifying the product playbook to access private wealth markets

- Product designs: what works and what doesn't (yet)
- Accessing private wealth markets
- How to manage liquidity: liquidity management tools

Moderator

Jeremy Agnew *BlackRock, New York*

Speakers

Stephen Adams *Blackstone, Cambridge, Massachusetts*

Kate Downey *Fried Frank Harris Shriver & Jacobson, London*

Renée Gagné *Cleary Gottlieb Steen & Hamilton LLP, New York*

Bob Mulhall *Towers Watson, Boston, Massachusetts*

MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

Conference dinner sponsors

Clifford Chance

ROPES & GRAY

Stikeman Elliott

Monday continued

1145 – 1230 **ESG – a global perspective**

- The global ESG regulatory landscape
- Cross-jurisdictional comparison of ESG labels
- Challenges in compliance for multi-jurisdictional asset managers
- How real is greenwashing – enforcement trends
- Is stewardship impactful
- ESG in private v. mutual funds

Moderator

Gretchen Passe Roin *WilmerHale, Boston, Massachusetts*

Speakers

Laura Houët *CMS Cameron McKenna Nabarro Olswang, London*

Joseph Idaszak *Brookfield, Chicago, Illinois*

Jin-Hyuk Jang *Debevoise & Plimpton LLP, Frankfurt*

Matthieu Riviere *Manulife Investment Management, Boston, Massachusetts*

1230 – 1400 **Lunch**

1400 – 1445 **A deeper dive into liquidity and valuation challenges**

- Global asset managers' approaches to liquidity risk management, and complexities of navigating contrasts between national/regional regulatory frameworks
- New and developing themes in liquidity requirements, including IOSCO's final report on updated liquidity risk management recommendations, and ESMA's implementing rules on liquidity management tools
- Operational and regulatory themes in valuation of liquid assets, including fixed income and derivatives
- Special topics in valuation of illiquid investments, including valuation topics for liquid alternative strategies

Moderator

Jamie Gershkow *Stradley Ronon Stevens & Young, New York*

Speakers

Ethan Corey *Eversheds Sutherland, Washington DC*

Dara Harrington *Arthur Cox, Dublin*

John Siena *Brown Brothers Harriman, London*

1445 – 1530 **Roundtable (two sessions)**

Fund Distribution in Asia AND Fund Distribution in LATAM

Fund distribution in Asia

This roundtable will discuss the challenges and opportunities for international asset managers seeking to distribute their products in Asia and the latest regulatory developments

Moderators

Jeremy Lam *Deacons, Hong Kong SAR*

Manish Ranjan *Goodwin, Singapore*

Divaspati Singh Khaitan & Co, *New Delhi*

Divya Thakur *Morgan Lewis, Singapore*

MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

Conference reception sponsor



Monday continued

1445 – 1530 **Roundtable**

Fund distribution in LATAM

This roundtable will discuss the challenges and opportunities for international asset managers seeking to distribute their products in LATAM and latest regulatory developments

Moderators

Juan Antonio Martín *White & Case, Mexico City*

Luis Gabriel Morcillo *Brigard Urrutia, Bogotá*

Leticia Wanderley *Demarest Advogados, São Paulo*

1530 – 1615 **Coffee/tea break**

1615 – 1700 **The people panel: governance, culture and people priorities for asset managers in 2026**

- Governance
- Culture
- Global mobility
- DEI
- Incentives
- Non-financial misconduct

Moderator

Tim Lewis *Travers Smith, London*

Speakers

Lesley Burkett *Bain Capital, Boston, Massachusetts*

Eliza Dungworth *Fidelity International, London*

Christian Gloger *Kleinberg Kaplan Wolff & Cohen, New York*

Sandra Lu *Llinks Law, Shanghai*

1700 – 1745 **Pension product innovation and global reform**

Global pension reforms and reshaping product design across jurisdictions: evergreen structures, SMAs, and tech driven solutions

- Challenges for private funds in adapting to regulatory shifts and client demands
- Insurance innovations addressing longevity and market risks
- Cross-border lessons: reform driven opportunities for asset managers

Moderator

Aliya Robinson *T. Rowe Price, Washington DC*

Speakers

John Aherne *William Fry, Dublin*

Bradley Fay *Seward & Kissel, New York*

Phillip Gillespie *Ascensus, Newton, Massachusetts*

James Monk *Fidelity International, London*

1930 – 2230 **Conference dinner**

Chart House

60 Long Wharf, Boston MA 02110

The dinner is a ticketed event, if you have purchased a place you will be notified by email on Monday 8 June, or alternatively you can check by logging on to your MY IBA account.

Transport is not provided

MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

The sessions will take place in the Ballroom
All breakfasts, breaks and lunches will take place in the Studio and Foyer

0800 – 1530 **Registration**

0800 – 0845 **Continental breakfast**

0845 – 0930 **Is your client's Private Fund in the wrong place?**

An honest discussion on the market biases of choosing a private fund jurisdiction: Cayman Islands, Luxemburg, Channel Islands, Ireland and Delaware

Moderator

Courtney Posner *Lowenstein Sandler, New York*

Speakers

Nadia Bonnet *Simpson Thacher & Bartlett, New York*

David Crosland *Carey Olsen, St Peter Port*

Morgan Dunne *McCann FitzGerald LLP, Dublin*

Theo Lefkos *Conyers Dill & Pearman, Grand Cayman*

Joshua Novak *Richards Layton & Finger, Wilmington, Delaware*

0930 – 1015 **The evolving landscape of ETFs**

Exchange Traded Funds continue to attract ever increasing investment flows globally and are a core tool for portfolio construction. This panel combines global perspectives to explore the key trends shaping the ETF market, including:

- The continued rise of active ETFs
- Investor behaviour and distribution, and ETF adoption by retail investors
- Regulatory and tax developments globally impacting ETF structuring
- Liquidity and market structure, and the role of authorised participants and market makers
- Next-Gen ETF structures and tokenisation

Moderator

Stephen Carson *A & L Goodbody, Dublin*

Speakers

Daniel Cripps *DWS Group, London*

Brad Feeley *John Hancock Investment Management, Boston, Massachusetts*

Michael James Lawson *MinterEllison, Sydney, New South Wales*

Jeremy Soutter *Carne Global Fund Managers, London*

1015 – 1100 **Coffee/tea break**

1100 – 1145 **Asset manager trade bodies**

Recent initiatives and focus for key trade bodies in the Asset Management sector

Moderator

Anne Yeo *Rajah & Tann Singapore, Singapore; Asia Pacific Regional Forum Liaison Officer, IBA Asset Management and Investment Funds Committee*

Speakers

Daniel Austin *AIMA, Washington DC*

Pat Lardner *Irish Funds, Dublin*

Imran Razvi *The Investment Association, London*

Tracy Soehle *Investment Adviser Association, Washington DC*

MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

Tuesday continued

1145 – 1230 **Views from the regulators**

Recent initiatives and focus for key regulators in the Asset Management sector

Moderator

Thoreau Bartmann *K&L Gates, Washington DC*

Speakers

Magdalena Camillo *US Securities and Exchange Commission, Washington DC*

Christopher Davis *Financial Conduct Authority, London*

Sean Fitzpatrick *Central Bank of Ireland, Dublin*

1230 – 1400 **Lunch**

1400 – 1445 **Fund tokenisation – moving towards production**

- Purpose of a tokenisation project: fund tokenisation can be both a digitalisation project (i.e. moving fund subscription and redemptions towards electronic, automated processes) and an accessibility project (fractionalising fund units)

The panel will explore:

- Whether there are still legal or regulatory impediments to fund tokenisation
- What is missing for more projects to pick up, e.g. custody solutions for institutional investors, standardisation and chain fragmentation

Moderator

Jenny Cieplak *Latham & Watkins, New York*

Speakers

Nick Ducoff *Solana Foundation, Boston, Massachusetts*

Beralda Kokoshi *Chainlink Labs, Boston, Massachusetts*

Julie Lascar *Digital Asset, Washington DC*

Jefferey LeMaster *Clifford Chance, New York*

Stefan Staedter *Arendt & Medernach, New York*

1445 – 1530 **Enforcement and investigation as supervisory tools: how regulators are shaping asset management conduct in 2026**

- Top-of-mind enforcement themes for asset managers
- Are regulatory practices stifling or facilitating innovation?
- Is “regulation by enforcement” converging or diverging across markets?
- Investigations in practice: from inquiry to resolution

Moderator

Danielle Royal *Stikeman Elliott, Toronto, Ontario*

Speakers

Katharine Harle *Dentons, London*

Uri Itkin *Akin Gump Strauss Hauer & Feld, New York*

Sam Raymond *Gibson Dunn & Crutcher, New York*

Alexandra Underwood *Fieldfisher LLP, London*

1530 – 1540 **Closing remarks**

Speaker

Alix d'Anglejan-Chatillon *Stikeman Elliott, Montréal, Québec; Chair, IBA Asset Management and Investment Funds Committee*

The IBA, its officers and staff accept no responsibility for any views expressed, presentations or materials produced by delegates or speakers at the Conference.

MOBILE TELEPHONES

Delegates are requested to ensure that mobile telephones and any other portable devices are switched to silent in working sessions.

You didn't get into law to push papers.

THE NEXT ERA of legal work isn't about choosing between people and technology. It's about giving professionals the space to think bigger, act faster, and deliver stronger outcomes, while routine work runs quietly in the background.

Harvey helps organizations redesign how work gets done, without losing what makes it human.

A photograph of two women sitting at a conference table in a meeting room. The woman on the left is wearing a light-colored blazer and is looking at a document. The woman on the right is wearing a light green cardigan and is looking at a laptop. The room has wood-paneled walls and a glass of water on the table.

Harvey

AI Tailored for Law

Debevoise & Plimpton

The Debevoise Investment Management Group

For decades, the Debevoise Investment Management Group has helped define the investment management industry. With consistently high rankings from *PEI*, *Chambers & Partners* and *The Legal 500*, we have been a recognized leader for more than 40 years. We partner with established and emerging managers alike, combining deep market insight with a comprehensive, one-stop approach to support funds at every stage of their lifecycle.

70% Debevoise clients include over 70% of the world's largest 100 private equity firms.

\$6.2 T+ Over \$6.2 T of committed capital across the 3,600+ funds our team has advised on.

200+ Over 200 corporate lawyers in the US, Europe & Asia devoting all of their time to investment funds.



Lexology Index Awards 2026
Private Funds Firm of the Year.



Multiple-Time Winner, Law360
Fund Formation Practice Group of
the Year.



They have white glove client service, extremely deep industry knowledge and long institutional knowledge of their clients. The team is unparalleled and their knowledge is industry leading."

— *Chambers USA* (2025), Private Equity: Fund Formation respondent

Legal advice
to the highest
precision

**LUXEMBOURG
HONG KONG
PARIS**

Elvinger Hoss Prussen
www.elvingerhoss.lu

NEW YORK

Elvinger Sàrl PLLC
www.elvinger.us





We build long term
relationships with our clients.
It shortens the meetings.

Lenz & Staehelin
The world's Swiss law firm



lenzstaehelin.com

Stay ahead

We have the expertise to navigate global regulatory challenges and empower growth with the confidence of success.



Caroline Clemetson, LL.M
caroline.clemetson@swlegal.ch



Dr. Dusan Ivanovic
dusan.ivanovic@swlegal.ch



Pauline Zoller
pauline.zoller@swlegal.ch

**Schellenberg
Wittmer**
Attorneys at Law

Zurich / Geneva / Singapore
www.swlegal.com

Clifford Chance

Creating advantage for your business drives everything we do

Our Global Funds & Investment Management and FinTech teams combine deep industry knowledge with commercial intelligence and established fintech experience to help you launch innovative products, navigate regulatory challenges, and seize opportunities worldwide.

From fund formation and cross-border structuring to fund tokenization, digital assets and blockchain, we deliver practical, forward-thinking solutions tailored to your business goals.

cliffordchance.com/funds



Ropes & Gray is
proud to support the
IBA Conference
on **Global Challenges**
and **Opportunities**
for the **Asset**
Management Industry.

ROPES & GRAY

ropesgray.com



Attorney Advertising © 2023 Ropes & Gray LLP

Stikeman Elliott
proudly supports
the **35th IBA Global
Challenges and
Opportunities for the
Asset Management
Industry Conference**

Stikeman Elliott

stikeman.com