

The seminar will focus on:

- Overview of the US pension market
- Sources of retirement incomes in the US today
- Issues of retirement readiness and relevant measures
- Product innovation around retirement
- Takeaways for Hong Kong

HKRSA has invited Ms. Mary Beth Glotzbach and Mr. Stephen Tong of Franklin Templeton to our upcoming seminar to share their views on these important topics, followed by a Q & A session.

Date: 6 Sep 2019 (Friday)
Time: 9:30am - 11:00am (Registration starts at 9am)
Venue: Franklin Templeton, 17/F Chater House, 8 Connaught Road Central, Central
Fee: Member: HK\$350 | Non-member: HK\$500
(ASHK members can enjoy HKRSA member rate)
Language: English

This seminar is eligible for 1.5 hours of non-core CPD/CPT training hours.
Enquiry or RSVP to events@hkrsa.org.hk or call (852) 2147 0090.

REGISTER NOW! *Limited seats, registration will be on first-come-first serve basis.*

Our Speakers



Ms. Mary Beth Glotzbach

Vice President, Senior Institutional DC Strategist
Franklin Templeton Institutional, LLC
San Mateo, California, United States



Mr. Stephen Tong

Client Portfolio Manager
Franklin Templeton Multi-Asset Solutions
Hong Kong

Session Chair:



Ms. Ka Shi Lau, BBS

Executive Committee, HKRSA
Managing Director & CEO,
BCT Group

Premier Sponsors:



EVENT PROGRAMME

9:00am - 9:30am

Registration

9:30am - 9:35am

Opening Remarks

Ms. Ka Shi Lau, BBS

Executive Committee | HKRSA

Managing Director & CEO | BCT Group

9:35am - 10:40am

Keynote Address

Ms. Mary Beth Glotzbach

Vice President, Senior Institutional DC Strategist

Franklin Templeton Institutional, LLC

San Mateo, California, United States

Mr. Stephen Tong

Client Portfolio Manager

Franklin Templeton Multi-Asset Solutions

Hong Kong

10:40am - 10:55am

Q&A

Session Chair:

Ms. Ka Shi Lau, BBS

Executive Committee | HKRSA

Managing Director & CEO | BCT Group

10:55am - 11:00am

Closing Remarks

Ms. Janet Li, CFA

Chairman | HKRSA

Wealth Business Leader, Asia | Mercer

SPEAKERS

**Ms. Mary Beth Glotzbach**

Vice President, Senior Institutional DC Strategist
Franklin Templeton Institutional, LLC
San Mateo, California, United States

Mary Beth Glotzbach oversees Franklin Templeton's defined contribution investment only (DCIO) business segment within the U.S. institutional market. Ms. Glotzbach works with existing and prospective plan sponsor clients to help their participants achieve a secure retirement through education and by aiding in the development of DC-focused solutions.

Prior to joining Franklin Templeton, she held various senior position at Morningstar and Chicago Trust Company in providing retirement related solutions including strategy & product development, software design and implementation.

Ms. Glotzbach is secretary of the Executive Committee and also serves on the Operating Committee for the Defined Contribution Institutional Investment Association (DCIIA). Ms. Glotzbach holds a bachelor of arts from DePauw University.

**Mr. Stephen Tong**

Client Portfolio Manager
Franklin Templeton Multi-Asset Solutions
Hong Kong

Stephen Tong is a Client Portfolio Manager for Franklin Templeton Multi-Asset Solutions (FTMAS). He focuses on designing and managing multi-asset portfolios engineered to meet specific client objectives by leveraging Franklin Templeton's global investment capabilities.

Mr. Tong joined Franklin Templeton in 2018 and has over 10 years of financial experience. Before joining Franklin Templeton, Stephen was a Senior Investment Consultant with Willis Towers Watson, where he advised institutional clients in Asia on investment strategy, portfolio construction and manager selection. Prior to his tenure with Willis Towers Watson, Stephen was an auditor with PricewaterhouseCoopers (PWC).

Mr. Tong holds a Bachelor of Economics and Finance from the University of Hong Kong and is a Chartered Financial Analyst.

**Ms. Ka Shi Lau, BBS**

Executive Committee Member | HKRSA
Managing Director & CEO | BCT Group

Ka Shi Lau is MD&CEO of BCT Group (comprising BCT Financial Limited ("BCTF") and Bank Consortium Trust Company Limited ("BCTC")). Graduated from Cornell University in the US with an MBA, Ka Shi is a strong advocate of corporate governance (including ESG), retirement protection, social inclusion and diversity, and health care. Apart from her current role as Vice Chairman of HKTA, she serves on various statutory and professional bodies including HKRSA, MPFA, SFC, HKICPA, IFEC and Asian Corporate Governance Association. Some of her current and past public service roles include Minimum Wage Commission, Hospital Authority, Women's Commission, Pamela Youde Nethersole Eastern Hospital, and Our Hong Kong Foundation's "Business for Social Good" Platform.