



Webinar on "Retirement schemes of tomorrow: Governance, investments and a focus on member outcomes"

At this important juncture in the global economy, change is inevitable. Thinking about the future state of our industry is all the more important. This webinar shares the market insights, global pension trends and a set of practical ideas for improving governance, investment portfolios and ultimately outcomes for members of retirement schemes in Hong Kong.

Please join **Mr. Paul Colwell (Senior Director)**, **Ms. Edwina Ho (Director)** and **Mr. Kevin Jeffrey (Director)** at Willis Towers Watson, on a **webinar sharing via Webex**.

- Date: 5 June 2020 (Friday)
- Time: 3:00pm-4:00pm
- Webinar: Login details will be emailed to participants no later than 4 June 2020 (Thursday)
- Fee: Free
- Language: English

Register now to learn about the changes, opportunities and more!

- Note:
1. This webinar is eligible for 1 hour of non-core CPD/CPT training hours, subject to approval by relevant accreditation bodies. Attendees must log in the webex with the same name and email address registered with the HKRSA.
 2. Webex facility will be provided by Willis Towers Watson. By registering to this event, you are providing your consent to the HKRSA to pass your personal particulars (including name, title, organisation and email address) to Willis Towers Watson to create access to the webex facility for you.
 3. Enquiry or RSVP to events@hkrsa.org.hk or call (852) 2147 0090.

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Event Programme

15:00 - 15:10 Welcome

Mr. Tony Archer

Chairman of Profile & Events Sub-committee | HKRSA
Managing Director, Asia Pacific | American Century Investments

15:10 - 15:40 Keynote Speech

Mr. Paul Colwell

Senior Director, Head of Advisory Portfolio Group, Asia | Willis Towers Watson

Ms. Edwina Ho

Director, Investments Asia | Willis Towers Watson

Mr. Kevin Jeffrey

Director, Investments Asia | Willis Towers Watson

15:40 - 15:55 Q&A

Speaker: Mr. Paul Colwell | Ms. Edwina Ho | Mr. Kevin Jeffrey

Facilitator: Mr. Tony Archer

15:55 - 16:00 Closing

Mr. Alan Young

Vice Chairman of Profile & Events Sub-committee | HKRSA
Head of Institutional Business, Greater China, Korea | Franklin Templeton

Our Speakers



Mr. Paul Colwell

Senior Director, Head of Advisory Portfolio Group, Asia | Willis Towers Watson

Paul Colwell leads the Advisory Portfolio Group (APG) and Dynamic Strategic Asset Allocation Group (DSAA) of Willis Towers Watson (WTW) Investments business in Asia. Based in Hong Kong, he works directly with public and sovereign wealth funds in the region, as well as corporate clients, advising on investment strategy, risk management, multi-asset portfolio construction and implementation.

In his role, Paul is primarily responsible for ensuring that portfolio advice delivered to clients in the region is appropriate given their objectives, risk tolerance and constraints, and fully incorporates WTW's best ideas. He has an excellent understanding of the investment process and appreciates the importance of delivering timely investment advice to clients to allow them to make informed investment decisions. Drawing on his asset management and practical consulting experience, Paul also assists some of the largest and most sophisticated regional asset owners in building out and improving their investment function and decision-making process.

Paul has over 15 years of industry experience. Prior to moving to Hong Kong, Paul spent five years working in investment management with Zurich Life in Dublin, Ireland, as part of a successful team that managed €7 billion in life and pension assets. At Zurich Life, he held various positions in the Investment team from Equity Analyst to Fund Manager, and was responsible for co-managing the European book of equity investments, market/sector research, and stock selection.

Our Speakers



Ms. Edwina Ho

Director, Investments Asia | Willis Towers Watson

Edwina Ho is a Director for Willis Towers Watson (WTW)'s Investments business in Asia. Based in Hong Kong, Edwina is responsible for the company's investment advisory and solutions offerings to institutional clients in Greater China.

Edwina has over 18 years of experiences in institutional business and client relationship management in the asset management industry. Having worked in various Asian markets, she has a deep understanding of how the institutional market is evolving across the region.

Before joining WTW, Edwina was head of Legg Mason's institutional business for Hong Kong and China. Whilst in this role, she worked with major sovereign wealth funds, pension funds, insurance companies, family offices and asset and wealth managers. Edwina has developed new investment activities, including around China's Belt and Road Initiative, and established a partnership with the Hong Kong Monetary Authority Infrastructure Financing Facilitation Office.

Prior to Legg Mason, she worked for China Everbright as Head of Institutional Sales and was responsible for marketing and business development in offshore markets. Edwina has also held senior positions at major global banks and consultancies, including Macquarie, Goldman Sachs and McKinsey.



Mr. Kevin Jeffrey

Director, Investments Asia | Willis Towers Watson

Kevin Jeffrey is a Director within the Investments team at Willis Towers Watson (WTW) and has been with the firm for over 12 years. Based in Hong Kong, Kevin provides advice on investment mission and beliefs, asset allocation as well as manager selection and monitoring. His primary focus is on investment strategy and how WTW's delegated solutions work to improve investment outcomes for asset owners.

After working in an actuarial valuations team at Alexander Forbes in 2007, he joined Watson Wyatt in London in 2008 and was involved in the production and delivery of investment consulting advice covering long-term funding level management, investment strategy and manager selection for institutional clients ranging from \$30m to \$30bn in total assets. In 2011, his focus shifted to work for WTW's UK Portfolio Construction Group, a committee of senior researchers and consultants responsible for building and managing portfolios for the company's global delegated clients.



Mr. Tony Archer

Chairman of Profile & Events Sub-committee | HKRSA
Managing Director, Asia Pacific | American Century Investments

Tony has over 25 years of investment management experience. He joined American Century in 2009 to build American Century Investments' Asian business as head of Asia Pacific. Tony joined from Morgan Stanley, where he was Managing Director for their Asian institutional advisory business. Prior to that, he was CEO of AXA Rosenberg's Asia Pacific business. Tony has a Bachelor of Economics and M Ec (prel) from Monash University in Australia, and a Graduate diploma in Computer Science from Monash University.