



CHOOSING WISELY

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29-31 of May 2017 | Sun City

PRESENTATIONS: MONDAY AFTERNOON, 29 MAY 2017

Presentation	Download	Topic	Speakers
No presentation Used	No presentation Used	<p>Opening Welcome</p> <p>Chairman Address: The future is today</p> <p>Announcement: New Batseta Directors</p>	<p>Facilitator: Andile Khumalo</p> <p>Address: Isaac Ramputa, Chairperson, Batseta</p> <p>Announcement: Anne-Marie D'Alton, CEO, Batseta</p>
No presentation Used	No presentation Used	<p>Disrupters and Innovators: Rewiring the Retirement Fund Industry</p>	<p>Facilitator: Andile Khumalo</p> <p>Panel: Azola Zuma, Chief Executive Officer, Sanlam Investment Management, Helena Conradie, Chief Executive Officer, Satrix, Mabatho Seeiso Independent Trustee, Linda Mateza, Head of Investments & Actuarial Services, GEPF</p>
Available	Click here to download	<p>Comprehensive Delegation Framework for Fund Decision Making: Who ratifies, notifies or resolves?</p>	<p>Chair: Koos Bezuidenhout, Chief Executive Officer, UASA</p> <p>Panel: Jolly Mokorosi, Trustee, Sanlam Umbrella Fund, Joelene Moodley, Director, RW Attorneys, Anton Swanepoel, Head: Sanlam Employee Benefits Legal Department, Sanlam Umbrella Fund</p> <p>Moderator: Karthi Pillay, Specialist: Retirement Scheme Governance, Telkom Retirement Fund</p>
Not Available in the public domain	Not Available in the public domain	<p>Member Education: Financial inclusion for retirement fund members</p>	<p>Chair: Lyndwill Clarke, HOD: Consumer Education, Financial Services Board (FSB)</p> <p>Speaker: Ruth Benjamin-Swales, Chief Executive Officer, ASISA Foundation</p>
Available	Click here to download	<p>Section 13A: What to do when employers fail to pay?</p>	<p>Chair: Victor Radebe, CEP Member of the Trustee Qualification</p>

			Panel: Muvhango Lukhaimane, Pension Funds Adjudicator, Office of the Pension Funds Adjudicator , Wilma Mokupo , Head of the Pensions Prudential Supervision Department, Financial Services board (FSB)
No presentation Used	No presentation Used	Business Case for Infrastructure Development: When is the right time to plant a tree?	Chair: Stephen Smith, Senior Policy Advisor, ASISA Panel: Sibusiso Luthuli, Chief Executive Officer and Principal Officer, Eskom Pension and Provident Fund , Doug Thomson, Head of Investor Relations, Old Mutual Alternative Investments
Available	Click here to download	ASISA Workshop: My Ethical GPS for wise choices	Speakers: David Morris, Trustee Education Programme Champion, ASISA Academy , Terence Berry, Principal, ASISA Academy

PRESENTATIONS:TUESDAY, 30 MAY 2017			
Presentation	Download	Topic	Speakers
No presentation Used	No presentation Used	Welcome	Facilitator: Andile Khumalo
Available	Download Speech transcription	Keynote address: Fiduciary Care: When leadership matters	Speaker: Paul Mashatile, MEC Human Settlements & COGTA
Not Available in the public domain	Not Available in the public domain	EPPF: The transformation journey in pictures	Facilitator: Andile Khumalo Speaker: Sibusiso Luthuli, Chief Executive Officer and Principal Officer, Eskom Pension and Provident Fund
Not Available in the public domain	Not Available in the public domain	Framing the mind of a portfolio manager: The arts and science of investment decision making.	Facilitator: Andile Khumalo Speaker: Samantha Hartard, Sector Head: Industrials, SA Equity & Multi Asset, Investec Asset Management
Not Available in the public domain	Not Available in the public domain	When should you fire your investment consultant?	Chair: Mkhusele Mbomvu, Chief Executive Officer, Mineworkers Provident Fund Speaker: Steven Nathan, Chief Executive Officer, 10X Investments
Not Available in the public domain	Not Available in the public domain	Active Passive – How to Outperform the Index Using Dynamic Strategies	Chair: Thomas Mketelwa, Chairperson, KZN Municipal Pension Fund

			<p>Speaker: Raphael Nkomo, Chief Investment Officer, Prescient Investment Management</p> <p>Panel: Nimisha Bhawan, Head of Product Development, Investment Solutions, Lungani Sibiyi, Multi-Manager, Eskom Pension and Provident Fund, Deresh Lawangee, National Head Investment Consulting Services, NBC</p>
Available	Click here to download	Disruption in Retirement Funding – Solving for what really matters to members	<p>Chair: Enos Ngutshane, Chairperson, PRASA Provident Fund</p> <p>Speaker: Anne Cabot-Alletzhauser, Head, Alexander Forbes Research Institute</p>
Available	Click here to download	<p>International Perspective:</p> <p>Global Investing with a Multi Asset Approach</p>	<p>Chair: Gordon Archibald, Trustee, Unilever SA Pension Fund</p> <p>Speaker: Darrell Riley, Asset Allocation Strategist, T. Rowe Price</p>
Not Available in the public domain	*Available on request	Is this the death of disability income?	<p>Chair: Sam Tsiane, Chairperson, Investment Committee of the Compensation Fund</p> <p>Co-Chair: Philda Mphephu, Principal Officer, Mineworkers Provident Fund</p> <p>Speaker: Lumondt Kritzinger, Head, Old Mutual Group Assurance and Boitumelo Nkomo, Consultant, Old Mutual Corporate Consultants</p>
Available	Click here to download	<p>International Perspective:</p> <p>Managing the Downside of Equity Investing</p>	<p>Chair: Sibusiso Luthuli, Chief Executive Officer and Principal officer, Eskom Pension and Provident Fund</p> <p>Speaker: David Schofield, President, INTECH Investment</p>
Available	Click here to download	<p>An eco-system where everyone thrives: how holistic thinking around employee benefits is a win win for everyone</p>	<p>Chair: Fiona Butler-Emmett, Principal Officer, RMB Pension and Provident Funds</p> <p>Speaker: Rowan Burger, Managing Executive: Strategy & Market Development Corporate & Public Sector, MMI Holdings</p>
Available	Click here to download	Asset Allocation in a time of Downgrades	<p>Chair: Kgomotso Ramokala, Principal Officer: Telkom Retirement/Provident/Pension Fund</p> <p>Speaker: Malcolm Fair, Managing Director, RisCura</p>

Available	Click below to download: Presentation 1 Presentation 2	Round Table: Future outlook on the Municipal Retirement Fund Landscape	Facilitator: Advocate Jan Koekemoer, Independent Panel: Sean Samons, Principal Executive Officer, National Fund for Municipal Workers , Len Dekker, Attorney, Len Dekker Attorneys , Soyisile Mokweni, Chairman, Consolidated Retirement Fund for Local Government , Loreta Dienst, Head: Annuity Sales, Old Mutual Corporate
Available	Click here to download	ASISA Workshop: My Ethical GPS for wise choices	Speakers: David Morris, Trustee Education Programme Champion, ASISA Academy , Terence Berry, Principal, ASISA Academy
No presentation Used	Download List of 2017 Graduates	Certification Ceremony: Occupational Qualification: PPEO & Professional Designations	Facilitator: Krappie Eloff, Batseta Anne-Marie D'Alton, Chief Executive Officer, Batseta , Isaac Ramputa, Chairperson, Batseta , Vijayen Naidoo, Chief Director, QCTO
Not Available in the public domain	Not Available in the public domain	Investment fees – what is really happening?	Chairperson: Mabatho Seeiso Speaker: Muitheri Wahome, Chief Client Officer, Investment Solutions
Available	Click here to download	Private Equity Masterclass 2.0	Chairperson: Mabatho Seeiso, Independent Speaker: Raja Hussain, Director, BlackRock

PRESENTATIONS: WEDNESDAY, 31 MAY 2017

Presentation	Download	Topic	Speakers
No presentation Used	No presentation Used	Welcome	Chairperson: Isaac Ramputa, Batseta
Available	Click here to download	Learning for Life: Batseta education and training opportunities	Facilitator: Krappie Eloff, Education and Training Manager, Batseta Panel: Wilma Mokupo, Head of the Pensions Prudential Supervision Department, Financial Services Board (FSB) , Sandra Dunn, Chief Executive Officer, INSETA , Diane Kemp, Deputy Director: Assessment, QCTO

Available	Click here to download	Fifty Shades of Asset Management – The Human Factor	Chair: Alison Jackson, Principal Officer, Deloitte and Touche Pension and Provident Funds Speaker: Grant Watson, Joint Boutique Head : Old Mutual Customised Solutions
Available	Click here to download	Downgrade of the country's rating to sub-investment grade: How should retirement funds react?	Chair: Moagi Ngubeni, PEO, ISCOR Employees Umbrella Provident Fund Speaker: Ntobeko Stampu, Portfolio Manager in ABSA Fixed Income team, Absa Asset Management
Available	Click here to download	Retirement Fund Reforms Government Panel – National Treasury, Financial Services Board, Pension Funds Adjudicator	Chair: Allan Greenblo, Editorial Director, Today's Trustee Panel: Alvinah Thela, Director: Retirement Funds, National Treasury , Muvhango Lukhaimane, Pension Funds Adjudicator, Office of the Pension Funds Adjudicator , Shadrack Motloung, Chief Operations Officer - Operational Services, UASA , Koos Bezuidenhout, Former President, FEDUSA

Special Note: We are only able to provide presentations where the presenter has given their approval for us to do so. Any presentations not included in the list were not authorised for public release.

* Please email bridget@batseta.org.za for more information or should you wish to request a copy of a presentation that is not listed here.