

Mercer Global Investment Forums 2026

Post-consensus

US | June 3–5 | Orlando

Wednesday, June 3

Time	Session/speakers
1:30–6:00 pm	Asset manager briefing
6:00–8:00 pm	Welcome reception and networking All attendees

Thursday, June 4

Time	Session/speakers
8:30–9:30 am	Welcome desk and breakfast
9:30–9:40 am	Our day ahead Andre Boucher, Senior Investment Consultant Mick Dempsey, President, Investments and Retirement
9:40–10:05 am	Investment themes and opportunities in a post-consensus world Cori Trautvetter, US Endowments & Foundations Commercial Leader Nick White, Global Head of Structural Trends
10:05–11:00 am	Keynote conversation: The impact of geopolitical trends on investing in a changing world Ian Bremmer, President and Founder, Eurasia Group and GZERO Media Niall O'Sullivan, Global Chief Investment Officer
11:00–11:30 am	Coffee break and networking
11:30–11:35 am	Emerging voices: Keeping the magic alive — Long-term value creation in private markets Arabella Raab, Investment Consultant

Time	Session/speakers
11:35 am–12:05 pm	<p>Post-consensus capital — Who controls the flow of capital now?</p> <p>Mike Forestner, Global CIO, Private Markets</p> <p>Patrick McGoldrick, Managing Director, Managing Partner for J.P. Morgan Private Capital and Partner for Growth Equity Partners</p> <p>Anne Marie Schultz, US Investments Commercial Leader</p> <p>Adam Smith, Vice President, Chief Investment Officer, Corewell Health</p>

	Client focus	Client focus	Private markets	A fresh look
12:15–12:45 pm	<p>The battle in wealth management for the next portfolio — Models, private markets, and the fight for flows</p> <p>Mike Chen, Product Manager, Alternative Investments, Capital Group</p> <p>Lisa Kots, US Wealth Management Portfolio Management</p> <p>Greg Stumm, President & CEO, American Beacon Partners</p>	<p>New frontiers in DC — Custom multi-manager funds</p> <p>Micah Fannin, Senior Investment Consultant</p> <p>Kelly Henson, US DC Investment Strategy Leader</p> <p>Carla Palamone, Principal, Human Capital, Edward Jones</p> <p>Larry Vasquez, Senior Portfolio Manager — Equities and Multi-Asset Solutions</p>	<p>Solving for success — Illiquid portfolio construction</p> <p>Mike Forestner, Global CIO, Private Markets</p> <p>Emily Sayles, Investment Director, Alternatives</p>	<p>What needs to happen for digital assets to be institutionally friendly?</p> <p>Max Becker, Senior Multi-asset Specialist</p> <p>Sam Swofford, Senior Investment Consultant</p>

Time	Session/speakers			
12:55–1:25 pm	<p>In the form of a question — A healthcare showdown</p> <p>Andre Boucher, Senior Investment Consultant</p> <p>Meggan O’Shea, Co-Lead Healthcare Investment Practice</p> <p>Richard Pugmire, Investments Director, Alternatives</p> <p>Matt Vokes, US Alternatives Investment Leader</p>	<p>The power of pension surplus</p> <p>David Cantor, Pension Strategist</p> <p>Brent Colbert, Senior Pension Risk Strategist</p> <p>Julia Kotchetkov, Senior Pension Strategist</p> <p>Matt McDaniel, US Defined Benefit Investment Leader</p>	<p>The promise and perils of semi-liquid funds</p> <p>Alecia DeCuollo, Head of Private Debt, North America</p> <p>Schon Williams, Investment Director, Alternatives</p>	<p>The good, the fad, and the snugly part two — A fistful of (thematic) dollars</p> <p>Lovey Sidhu, Sustainable Investment Research Specialist</p> <p>Nick White, Global Head of Structural Trends</p>
1:25–2:55 pm	Lunch			
2:55–3:25 pm	<p>Refining the endowment model</p> <p>Becky Farnsworth, Senior Investment Consultant</p> <p>Ronak Patel, Senior Investment Consultant</p> <p>Geoff Wilson, Senior Investment Consultant</p>	<p>Signal or slander — Untangling private credit headlines</p> <p>Rebecca Harlowe, Investment Director, Insurance</p> <p>Stephanie Thomes, Senior Investment Strategist</p>	<p>Private market sports investment — Novelty or new asset class?</p> <p>Catherine Abely, Senior investment Specialist, Private Equity</p> <p>Neil Blundell, Chief Investment Officer, CAIS Advisors</p> <p>Jordan Solomon, Partner, Arctos</p>	<p>Evolving implementation — How derivatives can amplify returns and cushion risk</p> <p>Gino Reina, Head of US Implementation — Investment Partnerships Group</p> <p>Kerrin Rosenberg, Global Head of Direct Investing</p>

Time	Session/speakers			
3:35–4:05 pm	Evolutions in DB endgames Dean Bruenn, Senior Pension Risk Strategist Monica Dragut, Annuity Solutions Leader Brett Dutton, Head of US Defined Benefit Portfolio Management	Pooled-employer plans — Are they delivering on their promises? Daniel Mayer, VP, Total Rewards, Aristocrat Preston Traverse, Defined Contribution Solutions Leader Shonna Turner, Vice President, Human Resources, Riskconnect Inc. Holly Verdeyen, US Defined Contribution Leader	Worth every penny? The cost of private markets Jeff Alexander, Vice President, Treasury & Chief Investment Officer, OhioHealth Adam Smith, Vice President, Chief Investment Officer, Corewell Health Matt Vokes, US Alternatives Investment Leader	Impact investing — Where to start the conversation? Cheryl Alston, Interim Executive Director, BeyGood Foundation Tamara Larsen, Senior Portfolio Manager
4:05–4:35 pm	Coffee break and networking			
4:35–4:40 pm	Emerging voices: The force is strong with private markets in DC plans Ken Hood, Investment Consultant			
4:40–5:15 pm	Theory to practice — The total portfolio approach Scott Freemon, IPG Investment Strategy Leader Andrew McDougall, US Chief Investment Officer Mike Sebastian, Global Head of Multi-Asset			
5:15–6:15 pm	Keynote conversation: The power of creativity Sylvia Diez, US Investments Sales Leader Duncan Wardle, Former Head of Innovation and Creativity at the Walt Disney Company			
7:00 pm	Forum dinner reception			

Friday, June 5

Time	Session/speakers
8:30–9:30 am	Welcome desk and breakfast
9:30–9:55 am	Welcome back and intro to AI Pat Tomlinson, President and Chief Executive Officer

Time	Session/speakers
9:55–10:00 am	Emerging voices: Dream, invest, cure — The magic of strategic capital in healthcare Tyler Stoll, Investments Director, Alternatives
10:00–11:00 am	Keynote conversation: AI, geopolitics, infrastructure, and the future of innovation Marc Cordover, US Wealth Leader Gilman Louie, Co-Founder & Managing Partner, America's Frontier Fund; Chief Executive Officer, AFF Foundation
11:00–11:30 am	Coffee and networking break
11:30 am –1:00 pm	Tomorrowland — Building our AI future together Segment moderator: Jo Holden, Global Head of Asset Manager Partnerships Part 1: Keynote conversation with Gary Gensler on AI regulation and safety Gary Gensler, Professor of the Practice of Global Economics and Management and Finance, Massachusetts Institute of Technology; Former Chair of the US Securities and Exchange Commission Part 2: Get ready for our AI future with Mickey McManus Mickey McManus, Senior Advisor and Leadership Coach, Boston Consulting Group; Founding Advisor for Collective Intelligence and Design Science, CELL
1:00 pm	Lunch