



ETFs for IFAs and Wealth Managers

Tuesday, 25 March 2014

London Stock Exchange, 10 Paternoster Square, London EC4M 7LS

Agenda

08.00	Registration & Breakfast
08.30	Welcome to Europe's Home of ETFs Pietro Poletto, Head of Fixed Income, ETPs and Securitised Derivatives, London Stock Exchange Group & CEO EuroTLX
08.45	Panel 1: Why ETFs can be the right tools to build a resilient portfolio Moderator: Chris Williams, Board Member, Institute of Financial Planning Panellists: Eleanor Hope-Bell, Head of UK SPDRS, State Street Global Advisors Vincent Denoiseux, Director, db-X Slawomir Rzeszotko, ETF Capital Markets Manager, Vanguard Andrew Walsh, Executive Director - Head UBS ETF Sales UK & Ireland, UBS AG
09.25	Panel 2: Choosing and using the right ETFs Moderator: John Barrass, Deputy Chief Executive, The Wealth Management Association (WMA) Panellists: Neil Jamieson, Head of UK Sales, ETF Securities MJ Lytle, Chief Development Officer, Source Ursula Marchioni, Head of EMEA Investment Strategies and Insights, iShares Mike Morrow, Sales and Marketing Director, Ascentric
10.05	Coffee & Networking
10.35	Panel 3: Alternatively weighted ETFs in investment portfolios Moderator: Russ Mould, Investment Research Director, AJ Bell Panellists: Isabelle Bourcier, Head of Business Development, Ossiam Bryon Lake, Head of Invesco PowerShares ETFs - EMEA Hector McNeill, Co-CEO, Boost ETP Ben Thompson, Director of Marketing for ETPs, Lyxor
11.15	Close

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UBS ETFs

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UBS ETFs reflect the full range of UBS's expertise in indexed portfolio management. Passive capital investments have been a core competence of UBS Global Asset Management for over 30 years. Overall, this business unit, which also includes UBS ETFs, has assets under management amounting to £117.4bn (December 2013). UBS is the 4th largest ETF provider in Europe in terms of assets under management, and Europe's second largest provider of physically replicated ETFs (relating to the ETF offer)¹. Assets under management in UBS ETFs amount to around £10.2bn (January 2014). UBS has reduced the TERs for all unit class "A" ETFs to a record low. This will benefit all UBS ETF investors as it translates into even more precise index replication and thus delivers lower costs. UBS ETFs has a broad spectrum of ETFs for all key markets and investment classes. Investors can choose from over 100 ETFs in the fields of equities, bonds, precious metals, real estate, commodities, alternative investments and multi asset portfolio. Among them, we offer the largest product range of physical-replicated, currency hedged ETFs (33 ETFs) in Europe². In addition, UBS ETFs was the first provider in Europe to launch a UCITS ETF on the UBS Multi Asset Portfolio in Europe, which provides investors with an exposure to a multi asset investment strategy investing in equities, commodities and bonds. For its synthetically replicated ETFs UBS has a unique "all-in fee concept"(Drag level). The drag level offers investors full cost transparency in advance over a twelve months period. UBS ETFs are listed across Europe's leading stock exchanges: Borsa Italiana, Deutsche Börse (XETRA), London Stock Exchange (LSE), and SIX Swiss Exchange.

¹ ETFG, January 2014

² Bloomberg, UBS Global Asset Management, January 2014