



**100 women in
hedge funds®**

**Education Session No. 629:
Liquid Alternatives: Latest Advancement and Changing Trends in the Italian Industry**

April 21, 2016 at 6:30 PM
Milano

100 Women in Hedge Funds and the CAIA Association invite you to a panel discussion on Liquid Alternatives in Milan about the Latest Advancement and Changing Trends in the Italian Industry.

Participants

Samantha Gleave, Liontrust
Jonathan Hughes-Morgan, Liontrust
Andrew McCaffery, Aberdeen Asset Management
Filippo Stefanini, Eurizon Capital SGR
Bill Kelly, *Moderator*, CAIA Association

Event Details

Date: April 21, 2016

Time: 6 PM Registration.

We will begin *promptly* at 6:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails will follow.

Hosts: CAIA Association and Liontrust

Location: Sheraton Diana Majestic
Viale Piave, 42, **Milano**, 20129, Italy

RSVP: [RSVP Now](#)

If you have any questions about this event, please contact the [Lugano/Milano](#) committee.

This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.

Admission to this event is free, but there is a 30 CHF charge if you register and do not attend (even if you cancel in advance). No-show proceeds will be donated to the beneficiary of 100WHF's most recent Swiss philanthropic initiatives.

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted.

Biographies

Samantha Gleave, Fund Manager, Liontrust

Samantha graduated from Aberdeen University in 1995 with an MA Honours degree in Economics and Management. She began her career at Sutherlands Ltd as a Consumer Analyst before moving on to Fleming Investment Management as Senior Investment Analyst covering Pan Europe where she worked with James Inglis-Jones. Samantha moved to Credit Suisse First Boston (Europe) Ltd in 2000 and was in a No 1 ranked equity research sector team (Extel& Institutional Investor Surveys). In 2005 she moved to Bank of America Merrill Lynch and became a Senior Equity Analyst and Director and won awards for Top Stock Pick and Earnings Estimates. Samantha joined Liontrust in 2012 as Fund Manager to work with James in managing the Cashflow Solution.

Jonathan Hughes-Morgan, Co-Head of International Sales, Liontrust

Jonathan began his career as a trainee fund manager with Hendersons, moving after four years to Sun Life as a fund manager. Following spells at OdeyAsset Management and Edmond de Rothschild, Jonathan joined JardineFleming to run their European business for three years. In 1998 he co-founded Thames River Capital with Charlie Porter. Jonathan was Managing Director of Thames River, leaving at the end of 2006 to set up Occam Asset Management which was acquired by Liontrust in 2011. Jonathan graduated from the University of Warwick with a degree in Management Science.

Andrew McCaffery, Global Head of Alternatives and Group Head of Solutions, Aberdeen Asset Management

Andrew McCaffery is the Global Head of Alternatives and Group Head of Solutions based in Aberdeen's London office. Andrew is responsible for all alternatives globally, including hedge funds, private equity, infrastructure and property multi manager and for oversight of the Solutions Departments. Andrew is chairman of the Pan Alternatives Investment Committee, and a member of all of the investment committees within the division. Andrew is also a member of the Group Management Board of Aberdeen Asset Management PLC. Andrew joined Aberdeen in 2011 from BlueCrest Capital Management, where he was a founder member of the Alignment Investors division. Before joining BlueCrest in 2008, he was head of absolute return strategies at Aberdeen. Prior to that, Andrew was CEO of Attica Alternative Investments Limited in London, a fund of hedge funds business. Earlier, he had been a Managing Director at UBS overseeing global coverage of hedge fund investors, having been an architect of the investment bank's hedge fund business planning and also a member of its proprietary risk committee. Joining the industry in 1983, Andrew held senior roles in fixed income and capital markets prior to joining UBS.

Filippo Stefanini, Head of Hedge Funds and Manager Selection, Eurizon Capital SGR

Filippo Stefanini is Head of Hedge Funds and Manager Selection in Eurizon Capital SGR. He started to work as Head of Research in Eurizon Alternative Investments in August 2008 and since January 2012 is Head of Hedge Funds and Manager Selection in Eurizon Capital SGR. He was a lecturer in risk management at the University of Bergamo in Italy from 2007 to 2011 and the Deputy Chief Investment Officer and Head of Asset Allocation at Aletti Gestielle Alternative SGR from 2001 to mid-2008. He previously worked as a consultant for Accenture in the asset management and investment banking areas. He authored Investment Strategies of Hedge Funds and Newcits: Investing in UCITS Compliant Hedge Funds, both published by John Wiley & Sons. He also co-authored several Italian language books published by Il Sole 24 Ore entitled I fondi newcits, Hedge Funds: strategie di investimento, and Hedge Funds: Investire per generare rendimenti assoluti. He received a BS in management engineering from Bergamo University.

Bill Kelly, CEO, CAIA Association

William (Bill) J. Kelly, CEO of the CAIA Association, is an asset management industry veteran with extensive managerial and boardroom experience gained through successive CFO, COO, CEO and Independent Board director roles. He has led both start-ups and full scale global organizations. Mr. Kelly is the former CEO of Robeco Investment Management, a subsidiary of the Netherlands-based global asset management organization with over \$200 billion of assets under management, where he oversaw all aspects of United States business, including portfolio management, distribution and product development. He also was responsible for the strategic growth, introduction, and positioning of new managed products in the US and Europe, including alternative investments.

Kelly was a founder and former CEO of Boston Partners Asset Management, a self-funded partnership enterprise, which became one of the industry's largest and most successful start-up money management organizations. Previous to that, he served as CFO of The Boston Company Asset Management and earlier in his career held various positions at Bear Stearns and was an auditor at PricewaterhouseCoopers.

**About CAIA Association**

The CAIA Association, a non-profit organization founded in 2002, is the world leader and authority in alternative investment education. The Fundamentals of Alternative Investments Certificate Program® is a natural extension of CAIA's mission to provide solutions to specific market needs for alternative investment education. The CAIA Association is best known for the CAIA Charter®, an internationally recognized credential granted upon successful completion of a rigorous two-level exam series, combined with relevant work experience. Earning the CAIA Charter is the gateway to becoming a member of the CAIA Association, a global network of over 8,000 alternative investing leaders located in 80+ countries, who have demonstrated a deep and thorough understanding of alternative investing. Having grown rapidly, the CAIA Association now supports vibrant chapters located in financial centers around the world and sponsors more than 120 educational and networking events each year.

**About Liontrust**

Liontrust is a specialist fund management company with £4.7bn (€6.6bn) in assets under management as at 31 December 2015. The company was launched in 1995, was listed on the London Stock exchange in 1999, is headquartered in London and has a branch office in Luxembourg. We have five fund management teams investing in UK, Continental European, Asian and Global Equities, and a sixth team managing Multi-Asset model portfolios. We have a range of nine funds domiciled in the UK and six long only and two alternative investment funds domiciled in Dublin.

About 100 Women in Hedge Funds (www.100womeninhedgefunds.org)

100 Women in Hedge Funds is a global, practitioner-driven non-profit organization serving over 13,000 alternative investment management investors and professionals in 20 locations through educational, professional leverage and philanthropic initiatives. Formed in 2001, 100 Women in Hedge Funds has hosted over 500 industry education events globally, connected more than 350 senior women through Peer Advisory Groups and raised over \$38 million for philanthropic causes in the areas of women's and family health, education and mentoring.