



EXECUTIVE GLOBAL CONFERENCE MAY 17-18 EXECUTIVE GLOBAL CONFERENCE MAY 17-18 EXECUTIVE GLOBAL CONFERENCE MAY 17-18

THE EVOLVING ROLE OF **PRIVATE EQUITY**  
IN FINANCIAL SERVICES





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**May 17-18, 2001**  
**W Hotel, Union Square**  
**201 Park Avenue South**  
**New York, NY 10003**

**For further information  
and registration, contact:**

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This *by invitation only* Executive Global Conference will explore key issues and strategies across the Financial Sector with Senior Executives and Industry Leaders from companies around the world.

## THURSDAY, MAY 17, 2001

8:30 Registration and Continental Breakfast  
at the W Hotel, Union Square, New York

### 9:00 - 9:30 WELCOME, INTRODUCTIONS AND OPENING REMARKS

Comments by: **John J. Hendrickson**  
Member of the Executive Board  
Swiss Re

### 9:30 - 11:00 PERSPECTIVES FROM INDUSTRY LEADERS REGARDING THE INSURANCE SECTOR

Moderator: **Alan Zimmermann**  
Senior Managing Director  
Fox-Pitt, Kelton

Comments by: **William R. Berkley**  
Chairman and Chief Executive Officer  
W. R. Berkley Corporation

**Allan Fulkerson**  
President and Chief Executive Officer  
Century Capital Management

**Robert Lusardi**  
Executive Vice President and Chief Executive Officer  
Financial Products and Services  
XL Capital

11:00 - 11:15 Refreshment Break

### 11:15 - 12:30 A LOOK INTO THE FUTURE: INVESTMENT OPPORTUNITIES IN GLOBAL MARKETS

Moderator: **Gustavo Henrique de Barroso Franco**  
Former Governor of the Central Bank of Brazil and Partner  
Rio Bravo Investments

Comments by: **Matthew Bishop**  
American Finance Editor  
The Economist

**John Lipsky**  
Chief Economist and  
Global Head Economic and Policy Research  
J.P. Morgan Chase

**Gary Parr**  
Managing Director and  
Head of Global Financial Institutions  
Morgan Stanley

**Ed Yardeni**  
Chief Investment Strategist  
Deutsche Bank Alex. Brown

**12:30**            **KEYNOTE SPEAKER AND LUNCH**

Address by:        **Paul A. Volcker**  
Former Chairman of the U.S. Federal Reserve Bank

**2:00 - 3:30**        **THE ROLE OF PRIVATE EQUITY  
IN FINANCIAL SERVICES**

Moderator:        **Robert Stone**  
Managing Director  
Securitas Capital

Comments by:     **David DeNunzio**  
Chief Executive Officer  
Credit Suisse First Boston Advisory Partners

**Saul Fox**  
Chief Executive Officer  
Fox Paine & Company

**Edward Mathias**  
Co-founder and Managing Director  
The Carlyle Group

**3:30 - 4:00**        **Refreshment Break**

**4:00 - 5:30**        **PRIVATE EQUITY: A RECIPIENT'S POINT OF VIEW**

Moderator:        **Jordan Graham**  
Vice President, Internet Business Solutions Group  
Cisco Systems

Comments by:     **George L. Estes, III**  
Chairman, President and Chief Executive Officer  
Discover Re

**Greg Flood**  
Chief Executive Officer  
Global Specialty Risk

**Dan Parsley**  
Chairman and Chief Executive Officer  
SalvageSale

**6:00**                **Cocktail Reception**

**7:00**                **ADDRESS AND DINNER**

Address by:        **Incoming Deputy  
Secretary of the U.S. Treasury**  
*tentative*

Entertainment:    **Pamela Hinchman**  
Soprano

## FRIDAY, MAY 18, 2001

7:45 - 8:30 Breakfast Buffet

### 8:30 - 10:00 WHY SPONSOR A PRIVATE EQUITY FUND?

Introduction: **Frederick Whittemore**  
Advisory Director  
Morgan Stanley

Address by: **Walter B. Kielholz**  
Chief Executive Officer  
Swiss Re

### 10:00 - 11:15 WHAT WE LOOK FOR IN PRIVATE EQUITY INVESTMENT OPPORTUNITIES

Moderator: **John F. Shettle, Jr.**  
Senior Managing Director  
Securitas Capital

Comments by: **Roger C. Altman**  
Former Deputy Secretary, U.S. Treasury and Chairman  
Evercore Partners

**John B. Clinton**  
Executive Vice President, Private Equity  
Conning Capital Partners

**Sheridan Schechner**  
Managing Director  
Goldman Sachs

11:15 - 11:30 Refreshment Break

### 11:30 - 1:00 EMERGENCE OF PRIVATE EQUITY IN EUROPE

Moderator: **Jock Birney**  
Senior Managing Director  
Securitas Capital

Comments by: **Paul Bradshaw**  
Chief Executive Officer  
Nascent Group S.A.

**Marek Gumienny**  
Managing Director  
Candover Partners

**Urs Wietlisbach**  
Partner  
The Partners Group

1:00 Lunch and Closing Remarks