

2019 PUERTO RICO

INVESTMENT SUMMIT

EL SAN JUAN HOTEL

AGENDA

FEBRUARY 14-15, 2019

PRIIA
Puerto Rico International Insurers Association

adworks
Strategic Thinking • Creative Solutions

BDO

PMA PIETRANTONI MENDEZ & ALVAREZ LLC

GOVERNMENT OF PUERTO RICO
Department of Economic Development and Commerce

DORADO BEACH

DLA PIPER

GRUPO FERRÉ RANGEL

INVEST PUERTO RICO

Kevane Grant Thornton
An instinct for growth™

pwc

YINGKE CARIBBEAN CHINA CENTER
盈科加勒比海中国中心

BMA GROUP

CHRISTIANSEN
COMMERCIAL REAL ESTATE

MAPFRE

mrg
morgan reed group

OLYMPIC AGENCY

RUMS of PUERTO RICO
RUM CAPITAL OF THE WORLD

ST CLAIR
COLLECTION

CARIBBEAN BUSINESS

Claro

Merrill Lynch
Bank of America Corporation

POPULAR

RANGER AMERICAN

Puerto Rico | Sotheby's
INTERNATIONAL REALTY

DAY 1

Thursday, February 14th, 2019

8:00 AM — **Breakfast**

9:00 AM — **Puerto Rico Now:** A Magnet for Investment



Ella Woger,
Chief Operating Officer
Invest Puerto Rico

9:15 AM — **Strengthening Puerto Rico's Investment Climate and Ease of Doing Business**



Manuel A. Laboy Rivera
Secretary of Economic
Development & Commerce

9:40 AM — **It Keeps Adding Up:** Acts 20 & 22 + GILTI Tax



Edgar Ríos-Méndez
Capital Member
PMA Law



Gabriel Hernández
Head of the Tax Division
BDO Puerto Rico

10:15 AM — **Been There. Done That. Here for More.**



Jeremy Griffiths
Chief Financial Officer
Putnam Bridge

10:25 AM — **Island Innovators:** How a local company is disrupting the mainland market.



Adriana Ramírez
Chief Legal & Compliance Officer
Abarca

10:35 AM — **Investment with High Impact**



James Connor
CEO
Acrecent Financial



Jennifer Pryce
President & CEO
Calvert Impact Capital

10:50 AM — **273 & 399:** It all adds up!



Walter Keenan
CEO
Advantage Insurance

11:00 AM — **Keynote Address**



Honorable
Ricardo Rosselló Nevares
Governor of Puerto Rico

Lunch

DAY 1

Thursday, February 14th, 2019

2:00 PM — **Puerto Rico:** The Good, The Bad and The Ugly.



Daven Michaels
CEO
123Employee

2:15 PM — **Puerto Rico:** 94% Opportunity Zone



Manuel López-Zambrana
Tax Partner
DLA Piper
Puerto Rico



Francisco Luis
Tax Partner
Kevane
Grant Thornton



Fernando Goyco
Counsel
PMA Law

2:50 PM — **Opportunities:** Finding Qualified Zones to Invest



Margaret Anadu
Managing Director and Head of the Urban Investment Group, Goldman Sachs



Denisse Flores
Tax Partner
PwC



Siri Bulusu
International Tax Reporter
Bloomberg

3:15 PM — **Real Estate, Tourism & High Impact Projects**



Ryan Christiansen
Principal
Christiansen Commercial



Keith St. Clair
Founder
St. Clair Collection



Fergus Campbell
Managing Director
Somera Road



Jaime Morgan-Stubbe
Managing Director of Real Estate, DBR Development

3:50 PM — **China's Growing Caribbean Footprint**



Jeff Carmichael
CEO
Yingke Caribbean China Center



Chris Renn
CEO
SIG

4:05 PM — **The Puerto Rican Dream**



Daniel Zammata
Co Founder , VP of Product & Head of Growth Latam
Sojourn Hospitality



Ryan Anderson
Co Founder & CEO
Sojourn Hospitality

4:15 PM — **Roadmap to the New and Better Puerto Rico**



Omar Marrero
Executive Director, Central Office of Recovery, Reconstruction and Resiliency of Puerto Rico (COR3)

DAY 2

Friday, February 15th, 2019

CAMPFIRES

9:00 AM — **How to Apply:** A Crash Course



Edgar Ríos-Méndez
PMA Law



Dialy M. Otero
BDO Puerto Rico

10:00 AM — **We Live Where You Vacation.** You can too.



Margaret Juvelier
Puerto Rico Sotheby's International Realty



Ryan Christiansen
Principal
Christiansen Commercial

11:00 AM — **Puerto Rico's Talented Workforce**



Tom McOsker
Bespoke Capital Markets Group



Franco Mondo
BMA Group

11:00 AM — **Creating an Impact**



James Connor
Acrecent Financial



Jennifer Pryce
Calvert Impact Capital

DAY 2

Friday, February 15th, 2019

FINANCIAL SERVICES FORUM

9:05 AM — Why Puerto Rico?



Walter Keenan
CEO
Advantage Insurance

9:15 AM — The Start: International Banking



Craig Lemasters
CEO
GXG



Alberto Bacó-Bagué
Founder
Partnership for Modern Puerto Rico



Eduardo Colón
President
Advantage International Bank Corp.

9:30 AM — The Early Adopters: Life Insurance



Angela Weyne
Former Commissioner of Insurance



Jay Walker
Founding Partner
J. A. Walker & Associates



Pedro Vidal
Capital Member
Vidal Nieves & Bauzá

9:50 AM — The Fast Followers: Captive Insurance



Ken Kotch
Principal
Ryan, LLC



David Kirkup
COO/ CFO
Captive Alternatives Group



Rubén A. Gely
President
International Insurer's Consulting Group

10:10 AM — On Deck: Investment Management



Craig Lemasters
CEO
GXG



Bo Williams
Partner, Gallatin Loan Management



Alberto Pagán
Managing Director
Glovista Investments, LLC.



Allison Kern
Partner
Morro Ventures



John B. Helmers
Founder & Investment Management, Long Focus Capital Management

10:50 AM — Weather Report: Tax and Regulatory Updates



Richard Newton
President & CEO
International Solutions



Manuel López-Zambrana
Tax Partner
DLA Piper Puerto Rico



José Merheb
Vice President & Business Development Officer
Popular Life Re



César Ignacio Matos
Rexach & Picó Law Firm



María de Los Ángeles Rivera
Partner Head of Tax & IBC Director
Kevane Grant Thornton

11:15 AM — On Watch: The Regulator's Perspective



George Joyner
Commissioner of Financial Institutions

11:40 AM — Looking Ahead: Innovation and Opportunity



Sam Jensen
Entrepreneur



Walter Keenan
CEO
Advantage Insurance



Rubén N. Gely
CEO
International Insurer's Consulting Group



Craig Lemasters
CEO
GXG