About the Center for Financial Services

As an academic center in Lehigh University’s College of Business and Economics, the Center for Financial Services (CFS) provides opportunities for academics, students, and practitioners to work and conduct research collaboratively on real-world, relevant business issues. The Center is defined by its mission to bridge theory and practice and to promote a meaningful exchange of ideas on critical issues affecting the financial services.

Goals of the CFS:
- Provide thought leadership in the field of financial services
- Develop innovative ideas and possible solutions to challenges facing the financial services industry
- Present new research on topics relevant to practitioners, regulators, and industry leaders
- Facilitate open discussions on finance topics among academic scholars, practitioners, policy makers, alumni, and students
- Offer a variety of opportunities for industry partners, practitioners, academic scholars, and students to engage with the Center through collaborations, on-campus speakers, academic and industry conferences, research, and fellowships

Center for Financial Services Advisory Board

- Hugo Barth ’90
- Doug Borkowski ’96
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- Chris Miller ’87 ’90G
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- Nick Van Benschoten ’07

December 5, 2017

Program

Welcome and Introduction

John DiVito ’93
Director of Product Management, Thomson Reuters

Georgette Chapman Phillips
Karen A. Chapel ’84 ’98G and Leland A. Chapel ’84G
College of Business and Economics, Lehigh University

Panel Discussion

Robert Dell ’76
Chief Equity Strategist and Senior Portfolio Manager, Nuveen Asset Management

Charles Kantor
Managing Director and Senior Portfolio Manager, Neuberger Berman

Dorothy Lamourex
Director, BlackRock

Niraj Patel ’21P
CIO, Lending Platforms, IBM

Rebecca Patterson
Managing Director and CIO, Bessemer Trust

Christof Stahel
Assistant Director, Division of Economic and Risk Analysis, Securities and Exchange Commission

Concluding Remarks

Kathleen Weiss Hanley
Bolton-Perella Chair in Finance and Director of the Center for Financial Services, Lehigh University

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Challenges Facing Asset Management

December 5, 2017

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The pronounced impact of MiFID II across
Growth of passive investing and the proliferation
Disruption and rise of technology such as
The greater role of compliance and the ever-
management including:
challenges, trends, and opportunities in asset
Tonight our expert panel will explore the current
The landscape
expectations in a lower return, higher risk world
of ETFs
robo-advisors
Bob Doll is senior portfolio manager and chief equity strategist
Respected authority on the equities markets among investors,