



# QuanTech Conference: Distributed Ledger Technology

NEW YORK  
DECEMBER 1 & 2, 2016

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# About QuanTech

These events have been built in collaboration with some of the world's leading banks, financial institutions and technology companies to ensure that the most pressing and pertinent issues are covered. Topics ranging across trading, fixed income, derivatives, syndicated loans and trade finance, identity and payments. Discussion for leading figures on both the business and technology sides of the global banking industry.

Topics: Distributed Ledgers in Financial Markets, Innovation in Capital Markets, Connecting Banking Environments to Distributed Ledgers, Smart Contracts, Decentralised Clearing Network, Decentralization in Financial Markets, Implementation Strategies, Distributed Ledger Regulations & Compliance....

Who will attend? CEOs, Chairmen, CTOs, CIOs, Managing Directors, Global Heads, Heads of Desks, Heads of Innovation and teams, Traders, Quants, Structurers, FinTech companies and more besides.

Benefits of attending:

- Boost your contact list
- The event will bring together the tech and financial worlds to create a framework for one to solve the needs of the other.
- It will be a perfect place to network and do business with everyone you need, under one roof.
- Keep up to date with this rapidly developing arm of the industry.
- Join the debate

WBS Training are pleased to announce our latest dynamic conferences in the ever changing world of quant finance. The fee for New York City is \$1100 both days and \$600 per day. Limited places so book early.

## Contact Information

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**Conference Location:**

**New York City**  
(More details to follow)

**Mail:**

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**Brighton**  
**BN1 1AL**  
**United Kingdom**

# Conference Speakers



**Sandra Ro**

CME Group  
Head of Digitization



**Alexander Lipton**

MIT Connection Science & Engineering, NYU  
Courant Institute, Oxford-Man Institute, and UCL  
Centre for Blockchain Technologies



**Marisol Collazo**

The Depository Trust & Clearing Corporation  
CEO



**Massimo Morini**

Gruppo Intesa San Paolo  
Head of Interest Rates, Credit and Inflation Models



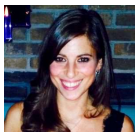
**Bijon Mehta**

J.P. Morgan  
FinTech, Innovation, Product Management



**Lucien Foster**

J.P. Morgan  
FinTech Strategic Partnerships



**Nicole Sandler**

Vice President, Regulatory Policy  
Barclays



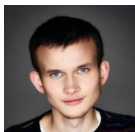
**Andre De Castro**

Blockchain of Things  
CEO and Founder



**David Nathanson**

Morningstar  
Asset Backed Finance and Structured Credit



**Vitalik Buterin**

Ethereum founder  
Cryptocurrency 2.0 advocate



**Igor Telyatnikov**

AlphaPoint  
Chief Operating Officer



**Christian Martin**

Tera Exchange  
Chairman & CEO



**Robert Sams**

Clearmatics  
CEO, Founder



**Jennifer Peve**

The Depository Trust & Clearing Corporation  
Co-Head Office of FinTech Strategy



**Stuart Elson**

Lombard Risk & Shisa Advisors, LLC  
SME and Consultant



**Ann Rutledge**

R&R Consulting  
Founding Principal and CEO



**Vikas H. Shah**

Rosenblatt Securities  
Managing Director, Tech/Media/Telecom and  
Financial Services Investment Banking



**David Shuler**

itBit  
FinTech Business Development

# Conference Speakers



**Brad J. Bailey**

Celent  
Research Director, Capital Markets



**Richard Hult**

Financial Technology and Infrastructure  
Consultancy  
Senior Capital Markets and FinTech Executive



**Bob Bonomo**

Bob Bonomo LLC  
Technology Consulting: Blockchain,  
Cryptocurrencies and Asset Management



**Pramod Achanta**

IBM  
Partner, Financial Markets and Blockchain



# Conference Day One - Thursday December 1

**08:30**

**Registration and Morning Welcome Coffee**

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**Distributed Ledgers in Financial Markets**

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**09:00 - 09:45**

**Keynote Speech: Introduction to Distributed Ledger – Distributed Ledger Technology**

**Presenter: Christian Martin, CEO, Tera Exchange**

- Future of Distributed ledger in financial services
  - How can Distributed ledger grow your margins?
  - Understanding the requirements of financial institutions and how Distributed ledger can be applied to each case
  - Why it is Distributed ledger the future?
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**09:45 - 10:30**

**Innovation in Capital Markets**

**Presenter: To be confirmed**

- Seeing beyond the hype: which problems can Distributed ledger applications realistically solve?
  - What is driving investment in Distributed ledger within the financial services?
  - How will ownership of and responsibility for Distributed ledger architectures develop?
  - Disrupt or be disrupted? What could be the cost of not investing in Distributed ledger?
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**10:30 - 11:00**

**Morning Break and Networking Opportunities**

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**11:00 - 11:45**

**Distributed Ledgers in Financial Markets**

**Presenter: Massimo Morini:** Head of Interest Rates, Credit and Inflation Models, **Gruppo Intesa Sanpaolo**

- Financial Market Problems: consensus by reconciliation
  - Too much Trust: Slow Transactions, Costly Duplication, Opacity, Litigations
  - The Risk Consequences: Operational Risk, Credit Risk and Capital requirement
  - From Fintech-hype to a possible business reform enabled by aspects of Tech
  - Variation and Initial Margin Workflow on a Distributed Ledger
  - Smart contracts: Robot Counterparties or Digital Referees?
  - Oracles, SGX and a question: can we make contracts with machines?
  - What impact on incumbents? NO or NEW roles for CCPs and Repositories?
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# Conference Day One - Thursday December 1

11:45 - 12:30

## Panel: Industry Leaders at the Forefront of Distributed Ledger Developments

- Exploring the key strategic implications of the technology
- A discussion on the future of Distributed ledger in financial services
- Critically evaluating its potential impact
- Scope and timeline of implementations.

### Panel:

- **Brad J. Bailey:** Research Director, Capital Markets, **Celent**
- **Other Panellists To be confirmed**

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12:30 - 13:30

Lunch

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## Decentralization Clearing Network

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13:30 - 14:15

## Decentralization in Financial Markets

Presenter: To be confirmed

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14:15 - 15:00

## Decentralization and the Wider Impacts of Distributed Ledger Technology

Presenter: **Stuart Elson: Shisa Advisors, LLC**

- What are the drivers of decentralization in financial services?
- The threat of disintermediation: will clearing and settlement services become obsolete?
- Facilitating the sharing economy: what will be the impact on P2P financial products?
- Decentralized autonomous organizations: will this be the future? Who will benefit?
- Will Distributed ledger technology accelerate the move to a cashless society?

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15:00 - 15:40

## Panel: Four Genuine Distributed Ledger Use Cases

Presenter: **Stuart Elson: Shisa Advisors, LLC**

### Panel:

- **Vikas H. Shah:** Managing Director, Tech/Media/Telecom and Financial Services Investment Banking, **Rosenblatt Securities**
- **Marisol Collazo:** CEO, **The Depository Trust & Clearing Corporation (DTCC)**
- **Richard Hulit:** Senior Capital Markets and FinTech Executive, **Financial Technology and Infrastructure Consultancy**
- **Igor Telyatnikov:** Chief Operating Officer, **AlphaPoint**

# Conference Day One - Thursday December 1

15:40 - 16:10

Afternoon Break and Networking Opportunities

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Smart Contracts

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16:10 - 16:55

Evaluating the Potential of Smart Contracts

**Presenter: Bijon Mehta:** FinTech, Innovation, Product Management, **J.P. Morgan**

- Where will the first viable use cases emerge?
  - How might smart contracts modernize financial products, such as mortgages?
  - How will personal and commercial insurance change with smart contracts?
  - Will the combination of IoT data and smart contracts revolutionize automation?
  - Coding the agreement: what shifts in culture and mentality are needed?
  - How will smart contracts be incorporated into the existing legal framework?
  - Is there a demand? Can this technology increase customer satisfaction?
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16:55 - 17:40

Smart Contract Templates

Presenter: TBC, R3 CEV

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17:40 - 18:10

Panel: Why Distributed ledger Detractors are Missing the Point

Getting Value from Distributed Ledger

Panel:

- **David Shuler:** FinTech Business Development, **itBit**
  - **Andre De Castro:** CEO and Founder, **Blockchain of Things**
  - **Other Panellists To be confirmed**
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18:10

Networking Reception

Stay and continue the day's discussions and network with food and drink.

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# Conference Day Two - Friday December 2

**08:30**  
**Morning Welcome Coffee**

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**09:00 - 09:45**  
**Keynote Speech: Blockchains, Distributed Ledgers, and P2P Transactions in Retrospective and Perspective: The Past, Present, and Future of the DLT**

**Presenter: Alexander Lipton: MIT Connection Science & Engineering, NYU Courant Institute, Oxford-Man Institute, and UCL Centre for Blockchain Technologies**

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## **Implementation Strategies**

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**09:45 - 10:30**  
**What it Takes to “get it right” to Implement Distributed Ledger Technology**

**Presenter: Lucien Foster: FinTech Strategic Partnerships, J.P. Morgan**

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**10:30 - 11:00**  
**Morning Break and Networking Opportunities**

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**11:00 - 11:45**  
**Overcoming the Challenges of Distributed Ledger Implementation**

**Presenter: Pramod Achanta: Partner, Financial Markets and Blockchain, IBM**

- What organizations are best placed to fulfill a trust validation role?
  - What challenges will the computational power demand bring?
  - What are the realities of transferring existing databases into blocks?
  - How limiting are legacy systems in Distributed ledger implementation?
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## **Distributed Ledger Regulations & Compliance**

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**11:45 - 12:30**  
**Panel: The Future of Global Financial Infrastructure**

- How will Distributed ledger solutions fit with the existing regulatory regime?
- What shifts in regulation should be proposed to facilitate adoption?
- How can collaboration with regulators be optimized?
- How can optimal transparency be achieved?

### **Panel:**

- **Sandra Ro:** Digitization, **CME Group**
- **Bob Bonomo:** Technology Consulting: Blockchain, Cryptocurrencies and Asset Management, **Bob Bonomo LLC**
- **Other Panellists To be confirmed**



# Conference Day Two - Friday December 2

**12:30 - 13:30**  
**Lunch**

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**13:30 - 14:15**  
**Digital Authentication: How can Distributed Ledger Aid Compliance with KYC and AML Regulation?**

**Presenter: Jennifer Peve:** Co-Head Office of FinTech Strategy, **The Depository Trust & Clearing Corporation**

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**14:15 - 15:00**  
**Regulatory Sandboxes Friend or Foe?**

**Presenter: Nicole Sandler:** Vice President, Regulatory Policy, **Barclays**

The FCA sandbox

- Overview of how project innovate works
- The FCA sandbox consultation
- How the regulatory sandbox works – benefits and disadvantages
- Problems with the current suggestion of an umbrella sandbox for FIs

Foreign Sandboxes

- Singapore – MAS sandbox consultation
- Australian sandbox consultation

Global/Cross border sandboxes

- Benefits and difficulties
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**15:00 - 15:30**  
**Afternoon Break and Networking Opportunities**

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**15:30 - 16:00**  
**What Are Regulators Thinking?**

**Presenter: Ann Rutledge:** Financial Journalist & Consultant

- Distributed ledger and regulation
  - Innovators and investors should not have to seek government's permission
  - Develop distributed ledger technology address the increased operational complexity
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**16:00 - 16:30**  
**What are the Potential Benefits of Distributed Ledger Architectures in Regulatory Reporting?**

**Presenter: David Nathanson:** Asset Backed Finance and Structured Credit, **Morningstar**

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## Conference Day Two - Friday December 2

**16:30 - 17:00**

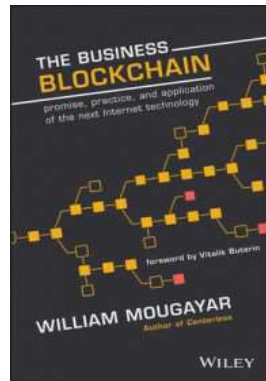
### **Predicting the Future of Distributed Ledger in Financial Services**

**Presenter: Joseph Plastina:** Strategy & Business Development, **Broadridge**

- Will Distributed ledger change the established business models of financial institutions?
  - What will be the next big milestone for Distributed ledger technology?
  - Which use cases will prove to be scalable for large financial institutions?
  - How do timeframes for adoption vary across different areas of financial services?
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## QuanTech Book Partner: The The Business Blockchain

### The Business Blockchain: Promise, Practice, and Application of the Next Internet Technology



Blockchains are new technology layers that rewire the Internet and threaten to side-step older legacy constructs and centrally served businesses. At its core, a blockchain injects trust into the network, cutting off some intermediaries from serving that function and creatively disrupting how they operate. Metaphorically, blockchains are the ultimate non-stop computers. Once launched, they never go down, and offer an incredible amount of resiliency, making them dependable and attractive for running a new generation of decentralized services and software applications.

The Business Blockchain charts new territory in advancing our understanding of the blockchain by unpacking its elements like no other before. William Mougayar anticipates a future that consists of thousands, if not millions of blockchains that will enable not only frictionless value exchange, but also a new flow of value, redefining roles, relationships, power and governance. In this book, Mougayar makes two other strategic assertions. First, the blockchain has polymorphic characteristics; its application will result in a multiplicity of effects. Second, we shouldn't ask ourselves what problems the blockchain solves, because that gives us a narrow view on its potential. Rather, we should imagine new opportunities, and tackle even more ambitious problems that cross organizational, regulatory and mental boundaries.

Just as the Internet created new possibilities that we didn't foresee in its early years, the blockchain will give rise to new business models and ideas that may still be invisible. Following an engaging Foreword by Vitalik Buterin, this book is organized along these 7 chapters:

1. What is the Blockchain?
2. How Blockchain Trust Infiltrates
3. Obstacles, Challenges & Mental Blocks
4. Blockchain in Financial Services
5. Lighthouse Industries & New Intermediaries
6. Implementing Blockchain Technology
7. Decentralization as the Way Forward

Purchase the book here: <http://eu.wiley.com/WileyCDA/WileyTitle/productCd-1119300312.html>

#### Author: William Mougayar



William Mougayar is general partner at Virtual Capital Ventures, an early stage tech fund. He is on the board of directors of OB1, the OpenBazaar open source protocol that is pioneering decentralized peer-to-peer commerce; a special advisor to the Ethereum Foundation; a member of OMERS Ventures board of advisors; an advisory board member to the Coin Center; and founder of Startup Management.

William Mougayar has been described as the most sophisticated blockchain business thinker. He is a blockchain industry insider whose work has already shaped and influenced the understanding of blockchain for people around the world, via his generous blogging and rigorous research insights.

Follow William Mougayar on twitter: [@wmougayar](https://twitter.com/wmougayar)

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Clearmatics is developing the next-generation clearing machines for financial OTC markets. Our blockchain platform brings together custodians and end-users on a single platform, where members can settle securities trades and automate the performance of derivatives and other financial contracts using our Decentralised Clearing Network (DCN) technology.

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<https://www.btcmedia.org/>

Distributed: The Distributed Ledger provides essential education and intelligence covering the development, deployment and application of blockchains and distributed ledgers. <https://godistributed.com/>

Bitcoin Magazine: Bitcoin Magazine is the original source of information, news and commentary about Bitcoin, the blockchain and digital currencies.

<https://bitcoinmagazine.com/>

yBitcoin: yBitcoin is a trusted and educational introductory primer into the world of Bitcoin and the blockchain since 2013. <https://ybitcoin.com/>



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