

IACPM 2026 FALL CONFERENCE

November 19-20, 2026
Fairmont Washington D.C. Georgetown
Washington – District of Columbia

Pre-Conference Day November 18, Wednesday

4:00 – 5:30 Concurrent Roundtable Discussions *(Open to IACPM members attending the Conference)*

- The Evolving Risk Landscape
 - Risk Mitigation: New Approaches & Emerging Trends (1 hour discussion)
 - Artificial Intelligence: Opportunities, Risks & Implications (30 minute discussion)

MODERATOR:

Jeremy Hatchuel, *Co-Founder*, The Convergence Group
Alec Innis

- The Evolving Risk Landscape
 - Risk Mitigation: New Approaches & Emerging Trends (1 hour discussion)
 - Artificial Intelligence: Opportunities, Risks & Implications (30 minute discussion)

MODERATORS:

John Calzolaio, *Head of Distribution Risk*, Sumitomo Mitsui Banking Corporation
Joost Hoogeveen, *Senior Director*, PGGM

- **DFI/ECA**

MODERATORS:

Hugo Gomes, *Director, Portfolio Oversight and Risk Transfer*, Export Development Canada

5:30 – 7:00 Welcome Cocktail Reception

Scroll Down for Day One and Day Two of the Fall Conference

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DAY 1	THURSDAY NOVEMBER 19, 2026	
8:00 – 8:30 AM	REGISTRATION AND CONTINENTAL BREAKFAST	
8:30 – 9:00 AM	OPENING REMARKS	
	SPEAKERS:	
	Som-lok Leung <i>Executive Director</i> IACPM	Neil Aiken <i>Divisional Board Member for Lending</i> Commerzbank Chairman, IACPM Board of Directors
9:00 – 9:45 AM	PLENARY SESSION: Geopolitical Outlook	
	• Post-election political landscape and implications for financial regulation • Tariffs, trade wars and global supply chain implications • Global hotspots and their impact on credit markets	
	SPEAKER: Nehad Chowdhury <i>Global Head of Sovereign Credit Management</i> Citigroup	
9:50 – 10:35 AM	PLENARY SESSION: Credit Strategy Outlook	
	• US and global macro outlook in the current environment • Mid-term elections (essential content) • Fed policy trajectory and credit cycle implications	
	SPEAKER: Dominique Touban <i>Head US Credit Strategy</i> Barclays	
10:35 – 11:15 AM	MORNING BREAK	(Foyer, 2 nd Floor)

Stream A: Risk Sharing and Markets
Industry and Sectors: Where are the Stress Points?

- Sector-specific stress signals: consumer, industrial, commercial
- Supply chain concentration and second-order risks
- Impact of private credit as a channel for sector risk

SPEAKERS:
Jim Boyle

Head of Lending, Americas
Commerzbank

Elie Zeitoune

Chief Credit Officer
HSBC USA

Stream B: Next-Gen CPM
CPM Business Models: How Leading Banks are Organized

- The growing focus on capital efficiency and balance sheet optimisation
- Competition and collaboration with private credit
- Increasing use of portfolio analytics and technology
- Changing accountabilities between origination, risk, treasury and CPM functions;
- Future capability requirements for CPM teams

SPEAKERS:
Pablo Fenoll

Head of CIB Portfolio Management
BBVA

Lauren Lacy

Head of Lending Product and Portfolio Management
Commonwealth Bank of Australia

Jon Sadow

Head of Americas Credit Portfolio Group – Lending
JPMorgan Chase

MODERATOR:
Puay Tin Teo

Managing Director, Head of Distribution, Credit Portfolio Management
Standard Chartered

Stream A: Risk Sharing and Markets
Sponsor Session: Oliver Wyman
Stream B: Next-Gen CPM
Portfolio Optimization & Risk Transfer Strategy
Sponsor Session: Crisil

- Setting portfolio-level targets: capital, concentration, and return objectives
- Metrics and frameworks for measuring optimization success
- Early warning signals integrated into risk transfer decisions

SPEAKERS:
Andreas Kern

Head of Corporate Lending
Commerzbank

Scott LaDue

Vice President and Head of Credit Growth Management
U.S. Bank

Wendy Shiau

Head of Credit Portfolio Management
PNC Financial Services

MODERATOR:
Suprabha AD

Global Head of Integral IQ
Crisil

12:40 – 1:50 PM

LUNCH

1:50 – 2:30 PM

DAY ONE STREAMS

Stream A: Risk Sharing and Markets

Active Risk Management Business Models

Sponsor Session: SS&C Algorithmics

- Building and resourcing an active risk transfer capability: team structure, mandate, governance
- Market conditions, deal flow, and timing considerations
- Prioritizing among instruments (SRT, CRI, CLOs, etc.)
- Regulatory and counterparty considerations

SPEAKERS:

Greg Mellone

Managing Director

Bank of America

Trent Morris

Managing Director, Head of Credit Portfolio Trading & Optimization

Wells Fargo

Miles Saunders

Global Head of Portfolio Management Group

Morgan Stanley

Vishal Sodha

Director, Global Credit Risk Solutions

SS&C Algorithmics

MODERATOR:

Jennifer Bearden

Deputy Executive Director

IACPM

Stream B: Next-Gen CPM

Next Generation Credit Journeys

Sponsor Session: McKinsey

- AI unlocking major opportunities across the credit journey
- Breakthroughs from ongoing work with clients
- Insight into which AI applications are delivering results
- Identifying where AI adds the most value in credit

Stream A: Risk Sharing and Markets Loan Market Transferability

- Documentation trends and their impact on CPM strategies
- Working with origination teams to preserve transferability at inception
- Secondary market liquidity and pricing in the current environment

SPEAKERS:

Simon Bowmer

Managing Director, Head of Global Loan Products & Global Leasing Pricing
Bank of America

William Ledger

Independent Non Executive Director
The Convergence Group

Amelia Slocombe

Managing Director, Head of Legal
Loan Market Association

MODERATOR:

Faizal Khan

Partner
Clifford Chance

Stream B: Next-Gen CPM

Credit Risk Insurance Markets

- Market conditions and deal flow
- Regulatory outlook
- Bank limit management
- Insurance wrappers
- Sanctioned claims

SPEAKERS:

Gregory Donovan

Managing Director, Credit Risk Transfer
Avondale

Kevin Njiraini

Director of Syndicated Loans and Mobilization
International Finance Corporation

MODERATOR:

Scott Ettien

Senior Director, Membership & Sponsorship
IACPM

Stream A: Risk Sharing and Markets Regulatory Perspectives

- ERBA

SPEAKERS:

Brian Cox

Deputy Director, Division of Risk Management Supervision at the FDIC
Federal Deposit Insurance Corporation

Joseph Hwang

Managing Director, Regulatory Policy
Goldman Sachs

Margot Schwadron

Director in Capital Policy
Office of the Comptroller of the Currency

MODERATOR:

Christopher Horn

Partner
Hogan Lovells Cadwalader

Stream B: Next-Gen CPM

Governance of Agentic AI in Credit Processes

- Risk-identification and risk tiering
- Capability-specific measurement and evaluation
- Runtime controls and operational governance
- System monitoring
- Enterprise and systemic AI risk management

SPEAKER:

Ilya Khaykin

Partner, Financial Services Practice
Oliver Wyman

4:30 – 5:25 PM

PLENARY SESSION: Senior Executives' Perspectives Fireside Chat

- Strategic perspectives on credit in the current environment
- Priorities for risk and credit portfolio management
- Balancing risk and return for new and emerging opportunities
- What senior leadership needs from CPM functions

SPEAKERS:

Cheryl Boucher

Chief Risk Officer, Banking and International
Citigroup

Wendy Gorman

Partner & Chief Credit Officer
Goldman Sachs

Alice Neumann

Global Head of O&A Client Strategy & Analytics/Head of Strategic Corporate Lending
Deutsche Bank

Mo Ramani

Chief Risk Officer
KeyCorp

MODERATOR: Som-lok Leung, Executive Director, IACPM

6:00 – 7:00 PM

COCKTAIL RECEPTION

7:00 – 10:00 PM

DINNER

8:00 – 8:30 AM REGISTRATION AND CONTINENTAL BREAKFAST

8:30 – 8:55 AM IACPM Important Industry Initiatives and Annual Meeting

SPEAKER:
Som-lok Leung
Executive Director
 IACPM

9:00 – 9:50 AM PLENARY SESSION: Understanding Washington

- Interaction of Congress and Federal Agencies
- Lobbying influence?
- Financial regulations in 2027

SPEAKERS:

Isaac Boltansky
Managing Director, Head of Public Policy
 PennyMac

Jeb Mason
Partner
 Mindset DC

Mickey Shemi
Managing Director, North America Structured Credit Leader
 Marsh Re

MODERATOR: **Kirk G. Willison**, *Senior Vice President, Global Public Affairs*, Arch Mortgage Insurance Company

9:55 – 10:35 AM PLENARY SESSION: 25th Anniversary Board Discussion

- How banks are classifying and measuring exposure to AI infrastructure as a credit asset class
- Limitations of existing frameworks (e.g. GICS) for data centers and power generation
- Concentration risk: how large is this sector getting in bank portfolios and how should limits evolve?
- Power demand, energy transition and the credit implications for data center financing
- Breaking from old norms: what new measurement and classification approaches are emerging?

SPEAKERS: TBC

MODERATOR: **Som-lok Leung**, *Executive Director*, IACPM

10:35 – 11:10 AM MORNING BREAK

11:10 – 12:00 PM PLENARY SESSION: Managing Credit Risk at the Frontier of Emerging Markets

- CPM approaches within development finance institutions
- Managing credit portfolios in emerging and frontier markets
- Capital Mobilisation: Collaboration between DFIs and commercial banks on risk transfer

SPEAKERS:

Federico Galizia
Vice President and Chief Risk Officer
 International Finance Corporation

Jozef Henriquez
Managing Director of Mobilization & Asset Sharing
 IDB Invest

Douglas Peterson
Former President and Chief Executive Officer
 S&P Global

Molly Whitehouse
Managing Director
 Newmarket

MODERATOR: **Rachel Robboy**, *Chief Risk Officer*, IDB Invest

12:05 – 12:45 PM PLENARY SESSION: Private Credit: Managing the Risks That Are Hard to See

- Collating and reporting private credit risks: data gaps, inconsistent disclosure and what banks receive from fund managers
- Valuation risk and illiquidity: how should CPM functions think about mark-to-model assets in a stress scenario?
- Market risk vs credit risk – leveraging private sector assets
- Bank-fund partnerships: structuring, monitoring and managing conflicts of interest
- Are regulators and banks looking at the same picture of systemic risk?

SPEAKERS:

Jason Marlow
*Managing Director, Portfolio
Hedging & Optimization*
Barclays

Stephen Pepper
Senior Adviser
Prudential Regulation Authority

Jason Wu
*Assistant Director and Division
Chief*
International Monetary Fund

12:45 – 2:00 PM CLOSING LUNCH