

FIDUCIARY EXECUTIVE PANEL: CURRENT EVENTS & TRENDS IN PERSONAL TRUST

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GLENMEDE

JPMORGAN CHASE & CO.



The View From My Chair - Top Three Focus Areas

Chief Fiduciary Officer

- War for Talent/Succession Planning
- Finding Efficiencies Through Technology/Centralization/Outsourcing
- Impact of Market Volatility/Inflation/Interest Rates on clients/fiduciary accounts

Head of Firmwide Fiduciary

Compliance

- Impact of Machine Learning and Artificial Intelligence
- War for Talent
- Rising Interest Rates

Chief Fiduciary Risk Officer

- Conflicts of Interest
- Lifecycle management
- ESG and propriety products

General Auditor

- Leveraging/integrating audit with 2nd line
- Flexible/proactive approach
- Assurance through data

Panelists:

Gabrielle D. Bailey, Chief Fiduciary Officer, Managing Director, The Glenmede Trust Company

Patrick Renaud, CPA/MBA, General Auditor, The Glenmede Trust Company

David Villwock, Head of Firmwide Fiduciary Compliance, Managing Director, JP Morgan Chase Bank

David P. Williams, CPWA, Chief Risk Officer, Wealth Management & Fiduciary Risk, Northern Trust

Moderator: Holly A. Bailey, JD, SVP, Global Fiduciary Risk Management, Northern Trust

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