



US HEALTHCARE AND LIFE SCIENCES CONFERENCE

June 6, 2013 | Metropolitan Club

NEW YORK

Chaired by Andrew Jack, Pharmaceuticals Correspondent of the Financial Times, this full-day conference will bring together a distinguished line-up of industry experts, government decision-makers and leading market commentators to review the shifting sands of the US healthcare industry, and explore direct and indirect implications of reform for key stakeholders-payers, life science companies, healthcare providers, investors and patients.

Confirmed speakers include:

Ian Read, Chairman of the Board and Chief Executive Officer, *Pfizer*

David Meeker, MD, President and Chief Executive Officer, *Genzyme*

Tom Pike, Chief Executive Officer, *Quintiles*

Jeff George, Global Head, *Sandoz* and Executive Committee Member, *Novartis*

Kevin Lobo, President and Chief Executive Officer, *Stryker*

Reynold (Pete) Mooney, Global Leader, Life Sciences and Health Care, *Deloitte Touche Tohmatsu*

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WHO SHOULD ATTEND?

This event is for CEOs, CFOs, CIOs, Heads of R&D, Emerging Markets, Consumer Health, Government Relations, Pricing, Regulation, etc. and other senior-level executives in the following sectors:

- Pharmaceuticals, Biotechnology, Generic and Specialty Pharmaceutical companies
- Medical Devices and Diagnostics
- Investment (Fund Managers, Venture Capitalists, Private Equity firms, Investment Bankers, IP Groups)
- Legal Counsel
- Healthcare IT (Patient records, data, mobile healthcare applications, social media)
- Regulation

CONFERENCE AGENDA

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| 8:00 am | Breakfast and Registration |
| 8:45 am | Opening Remarks Andrew Jack , Pharmaceuticals Correspondent, <i>Financial Times</i> |
| 8:50 am | Keynote Interview: FT View from the Top Ian Read , Chairman of the Board and Chief Executive Officer, <i>Pfizer</i> |
| 9:20 am | Panel Discussion: Transformation Beyond US Healthcare Reform - Competing on Value <p>With the re-election of President Obama, the focus of healthcare reform moves from the realm of policy to implementation. While uncertainty remains regarding the impact of Appropriation and funding for reform, what is certain is that reform will fundamentally transform the way the life science and broader healthcare industry operates and adds value. The reforms will significantly alter the payer landscape. They will re-energize CER, and will bring into being new cost sharing entities such as Accountable Care Organizations (ACO) with the power to influence the demand for life science products and services. What are the direct and indirect implications of reform for key stakeholders-payers, life science companies, healthcare providers, investors and patients? How are stakeholders adjusting to a world in which value rather than product becomes to new battleground/arbiters of competition?</p> <p>Fred Hassan, Managing Director, Healthcare, <i>Warburg Pincus</i> Paul Hudson, Executive Vice President, North America, <i>AstraZeneca</i> John Noseworthy, MD, President and CEO, <i>Mayo Clinic</i> Moderator: Terry Hisey, Vice Chairman, US Life Sciences Leader, <i>Deloitte</i></p> |
| 10:30 am | Networking Break |
| 11:00 am | Panel Discussion: Riding the Next Wave of Emerging Market Growth <p>With their large populations, rising income levels and expanding healthcare infrastructures, emerging markets will continue to play a central role in the diversification and growth strategies of life science companies. Yet a number of factors - slowing growth in China, a new wave of protectionism in India, Brazil and Russia, and a growing preference for generics over their more expensive branded counterparts - have recently combined to force a rethink among many life science companies of their approaches to these markets. Faced with these challenges, many are now setting their sights beyond the now maturing BRICs to the a new set of fast-growing countries (Turkey, Indonesia, Vietnam and Argentina among them) where levels of growth and the volume of potential sales are attracting close scrutiny.</p> <p>Dirceu Bras Aparecido Barano, Chairman, <i>Anvisa</i> Jeff George, Global Head, <i>Sandoz</i> and Executive Committee Member, <i>Novartis</i> Michael Warmuth, Executive Vice President, Established Pharmaceuticals, <i>Abbott</i> Moderator: Andrew Jack, Pharmaceuticals Correspondent, <i>Financial Times</i></p> |
| 12:00 pm | Lunch |

CONFERENCE AGENDA

1:10 pm

Panel Discussion: Drugs, Devices and Diagnostics: Innovation Through Convergence

The convergence of drugs, device and diagnostics is leading to innovative healthcare solutions and to new opportunities for business growth and product differentiation in the life science industry. The number of such collaborations is multiplying, and the stage now looks set for steady growth. To realize the value of convergence however, firms will have to move beyond traditional industry boundaries and adjust to operating with companies with substantially different business models, product life cycles, regulatory frameworks, organizational structures, and corporate cultures. What are the business and commercial models for convergence? Is convergence the future of the industry?

Mara Aspinall, President, Ventana Medical Systems; Head, *Roche Tissue Diagnostics*

John Capek, PhD, Executive Vice President, Medical Devices, *Abbott*

Jan Groen, PhD, Chief Executive Officer, *MDxHealth*

Kevin Lobo, President and Chief Executive Officer, *Stryker*

David Meeker, MD, President and Chief Executive Officer, *Genzyme*

Moderator: Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*

2:20 pm

Keynote Address

Colin Hill, CEO and Co-Founder, *GNS Healthcare*

2:40 pm

Networking Break

3:00 pm

Consumer Health in Focus

Amy Schulman, Executive Vice President and General Counsel; Business Unit Lead, Consumer Healthcare, *Pfizer*

3:20 pm

Panel Discussion: New Financing and Operating/Business Models for Innovation/R&D

In their continuing efforts to tackle diminishing R&D returns, pharma companies are taking advantage of a range of innovative R&D financing and partnership models which allow them to increase the number of promising drug programs to which they have access, to share the risk and costs of innovation, and to reduce the development risk of internal programs. In so doing, they are entering into novel forms of partnerships with CROs, biotech companies, and a broader range of financial investors, as well as opening the possibility of innovative cross- industry partnerships.

Arthur Higgins, Senior Consultant, *Blackstone Healthcare Partners*

Jan Lundberg, PhD, EVP, Science and Technology and President, *Lilly Research Laboratories*

Reynold (Pete) Mooney, Global Leader, Life Sciences and Health Care, *Deloitte Touche Tohmatsu*

Tom Pike, Chief Executive Officer, *Quintiles*

Jonathan Sheffield, Chief Executive Officer, *NIHR Clinical Research Network*

Moderator: Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*

4:30 pm

Closing Remarks

Andrew Jack, Pharmaceuticals Correspondent, *Financial Times*

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