



INTERNATIONAL INSTITUTE FOR THE STUDY OF CROSS-BORDER INVESTMENT AND M&A  
跨国投资并购国际研究协会  
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**International Roundtable Symposium  
on Cross-Border M&A**

Hosted by



**Tuesday, March 5, 2024  
New York University**

**SYMPOSIUM**  
Lipton Hall, 108 West 3rd Street  
New York, NY 10012

**LUNCH**  
Vanderbilt Hall  
40 Washington Square South  
New York, NY 10012

Followed by  
**COCKTAILS AND DINNER**  
March 5, 2024, 6:30 p.m.  
Le Bernardin Privé  
155 West 51st Street  
New York, NY 10019

**PRE-SYMPOSIUM RECEPTION**  
March 4, 2024, 6 p.m.  
Bar65 at the Rainbow Room  
30 Rockefeller Plaza, 65th Floor  
New York, NY 10112

The **International Institute for the Study of Cross-Border Investment and M&A** is pleased to hold its tenth Roundtable Symposium on current issues in international cross-border mergers, acquisitions and strategic investments, with a special focus this year on cross-border deals in the volatile post-pandemic world order. The Symposium represents an effort by its founding universities, New York University, Peking University and Cambridge, and affiliated professionals and companies, to foster dialogue and connections among the world's leading experts and thought leaders about key issues, trends and developments in the global deal markets. The goal is to encourage pragmatic, de-politicized analysis and study of the market dynamics that fuel business expansion through M&A, and of the financial, legal, governmental and societal frameworks that facilitate or hinder such activity. The Symposium is open only to invited participants. The roundtable format is designed to encourage participation by all attendees.



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- 8:00 a.m. – 8:45 a.m.**      **Registration and Breakfast** (*Lipton Hall*)
- 8:45 a.m. – 9:00 a.m.**      **WELCOME & OPENING REMARKS**  
*David Yermack, Albert Fingerhut Professor of Finance and Business Transformation, New York University Leonard N. Stern School of Business; Director, NYU Pollack Center for Law and Business*
- 9:00 a.m. – 9:45 a.m.**      **MORNING KEYNOTE SPEAKER**  
**“HOW TO MAKE A FEW BILLION DOLLARS”**  
*Brad Jacobs, Executive Chair of XPO and Author of “How to Make a Few Billion Dollars,” on the playbook for creating his 8th company, QXO  
in conversation with  
Adam Emmerich, Partner, Wachtell, Lipton, Rosen & Katz*
- 9:45 a.m. – 10:15 a.m.**      **OVERVIEW AND OUTLOOK: XB Deals Past, Present and Future**  
*Stephan Feldgoise, Managing Director & Co-Head of Global Mergers & Acquisitions, Goldman Sachs  
Jeffrey Rosen, Deputy Chairman, Lazard*  
**Moderator: John Robinson, Partner, Wachtell, Lipton, Rosen & Katz**
- 10:15 a.m. – 10:35 a.m.**      **Break**
- 10:35 a.m. – 11:25 a.m.**      **THREATS OF DEGLOBALISATION AND RISING GEOPOLITICAL TENSION:  
How to Deal with Protectionism, Tariffs and Political Upheaval**  
*Susan Athey, Chief Economist, Antitrust Division, United States Department of Justice  
Cai Hongbin, Dean, Chair of Economics, The University of Hong Kong  
John Fingleton, Chair, Fingleton, former Chief Executive, Office of Fair Trading (UK)  
Damien Levie, Head, Technology & Security, FDI Screening in the Directorate-General for Trade, European Commission  
Liu Qiao, Dean, Guanghua School of Management, Peking University  
Roberto Silva, President, Comisión Nacional de Valores (Argentina)  
Brad Staples, Chief Executive Officer, APCO Worldwide*  
**Moderator: Peter Williamson, Professor of International Management, Cambridge Judge Business School**



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**11:25 a.m. – 12:15 p.m. DEALS DONE; LESSONS LEARNED: Strategic, Tactical, Unsolicited, Going Private and More**

*Eddie Dixon, former Chief Legal Officer and Senior Vice President, NI (National Instruments)*

*Chuck Mattera, Chair & CEO, Coherent*

*David Redfern, President Corporate Development, GSK*

*Eric Starkloff, former President and CEO, NI (National Instruments)*

*Marjolein van der Linden, Chief Operations Officer, RTL Nederland*

**Moderator: Adam Emmerich, Partner, Wachtell, Lipton, Rosen & Katz**

**12:15 p.m. – 12:30 p.m. Attendees move from Lipton Hall to the Greenberg Lounge in Vanderbilt Hall**

**12:30 p.m. – 1:45 p.m. LUNCH and KEYNOTE SPEAKER (Greenberg Lounge)**

**THE ALTERNATIVE INVESTMENT ECO-SYSTEM:  
Investing for the Long-Term**

*Scott Kleinman, Co-President, Apollo Asset Management*

*in conversation with*

*Andrew Nussbaum, Partner, Wachtell, Lipton, Rosen & Katz*

**1:45 p.m. – 2:00 p.m. Attendees move from the Greenberg Lounge in Vanderbilt Hall to Lipton Hall**

**2:00 p.m. – 2:50 p.m. PURPOSE, OWNERSHIP, GOVERNANCE, AGENCY and ACTIVISM: Are we at an inflection point, or a great reversal?**

*Jillian Alsheimer, Partner, Perella Weinberg Partners*

*Janene Asgeirsson, Chief Legal Officer and Corporate Secretary, Analog Devices*

*Jordi Canals, Professor and Fundación IESE Chair in Corporate Governance; former Dean, IESE Business School*

*Siok Lan Pek, Managing Director, Special Projects, Temasek*

*Laurent Vallée, General Secretary, Carrefour Group*

**Moderator: Karessa Cain, Partner, Wachtell, Lipton, Rosen & Katz**

**2:50 p.m. – 3:30 p.m. AI: A New Golden Age?**

*Che Chang, General Counsel, OpenAI*

*Gordon Moodie, Chief Product Officer, Harvey*

*Sabastian Niles, President and Chief Legal Officer, Salesforce*

*Dominic Perella, General Counsel, Character.ai*

**Moderator: Raaj Narayan, Partner, Wachtell, Lipton, Rosen & Katz**



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**3:30 p.m. – 4:15 p.m. CRYPTO, SECURITIES AND MARKETS: Where are we going? When will we get there? Are we ready?**

*Antonia Apps, Director, New York Regional Office, Securities and Exchange Commission*

*David Yermack, Albert Fingerhut Professor of Finance and Business Transformation, New York University Leonard N. Stern School of Business; Director, NYU Pollack Center for Law and Business*

**Moderator:** *William Savitt, Partner, Wachtell, Lipton, Rosen & Katz*

**4:15 p.m. – 4:25 p.m. BREAK**

**4:25 p.m. – 5:45 p.m. LEGAL ROUNDTABLE: M&A in the U.S., Asia, Europe and Beyond – outbound, domestic and inbound deals in a shifting world order; where does the juggernaut veer?**

**Moderator:** *Mark Gordon, Partner, Wachtell, Lipton, Rosen & Katz*

*Shuttles to Le Bernardin Privé will be available from 108 West 3<sup>rd</sup> Street*

**6:30 p.m. COCKTAILS & DINNER**

**Welcome:**

*David Yermack, Albert Fingerhut Professor of Finance and Business Transformation, New York University Leonard N. Stern School of Business; Director, NYU Pollack Center for Law and Business*

**Dinner Conversation:**

**“FROM INDUSTRIAL CONGLOMERATE TO FOCUSED GLOBAL AEROSPACE COMPANY”**

*Gregory Hayes, Chairman and Chief Executive Officer, RTX  
in conversation with*

*Joshua Cammaker, Partner, Wachtell, Lipton, Rosen & Katz*

**CLOSING REMARKS**