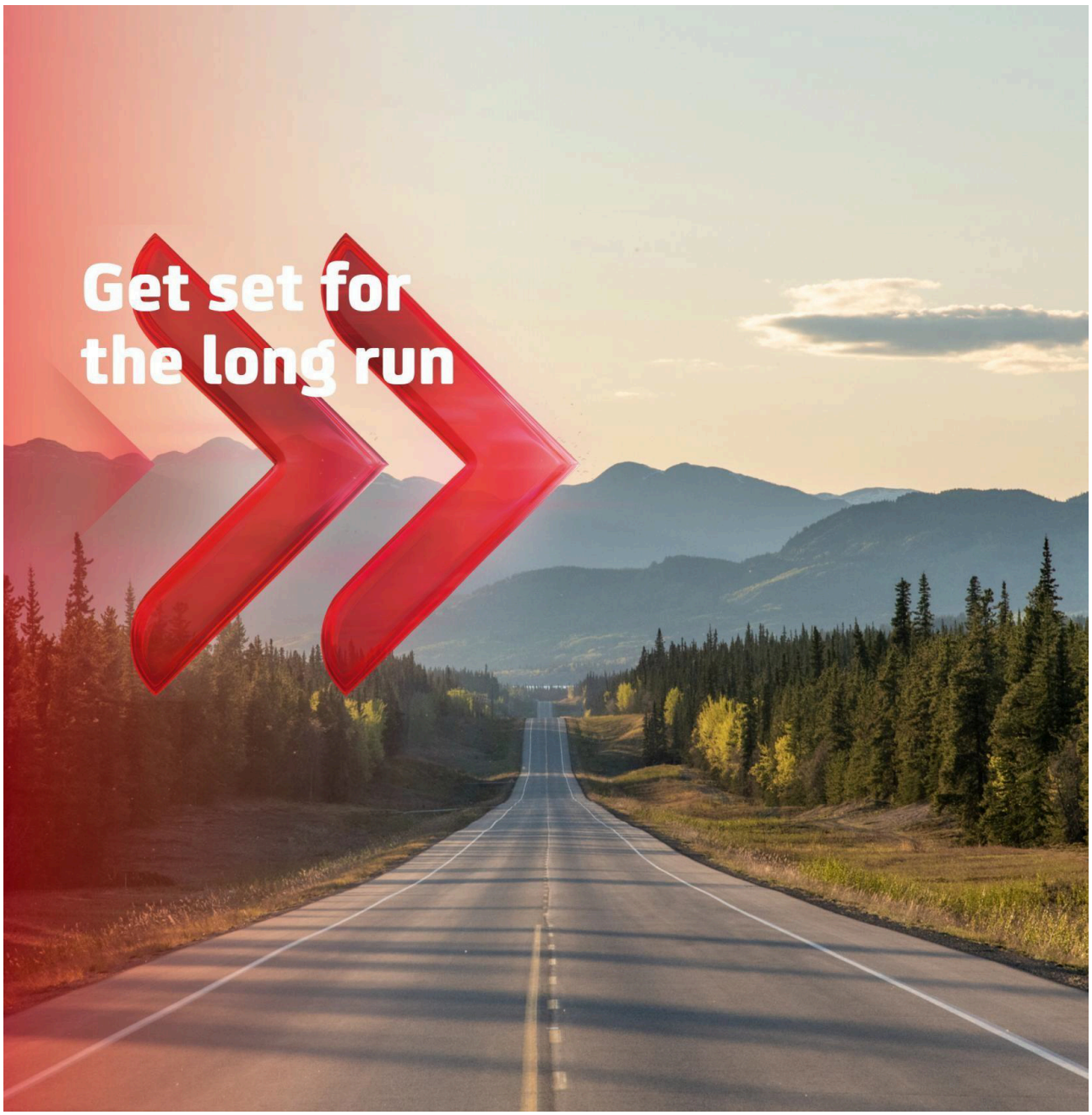



# UniCredit Longevity Economic Forum 2026

Bucharest, 5 November 2026

# Agenda

A morning forum in two complementary blocks, bringing together economists, scientists and investors to explore what living longer means for the economy, for capital and for families across generations.

## BLOCK 1 · INVESTMENTS, WEALTH AND GENERATIONAL TRANSITION

**09.00 – 09.30** **Registration, Networking & Welcome Coffee**

**09.30 – 09.35** **Welcome Address**
**Mihaela Lupu**, CEO, UniCredit Bank România

**09.35 – 10.15** (40') **Investing for the Long Run: A Conversation**
A dialogue on investing in a longer-life world, followed by audience Q&A
**John "Chip" Montgomery**, President, Rockefeller Global Investment Management International
in dialogue with **Claudia Vacanti**, Responsible for CE&EE Funds Business Development, UniCredit

**10.15 – 10.55** (40') **Family Wealth Longevity: Lessons from around the World about what it is and how to achieve it**
**Prof. Patricia Angus**, Founder, Global Family Enterprise Program, Columbia Business School

**10.55 – 11.25** (30') **Beyond Capital: Art Collection as an Investment Bridge Across Generations**
The panel explores the profound intersection of capital, culture, and generational transition. Moderated by **Raluca Michailov, owner of Forbes Romania & Moldova**, the conversation brings together **Anca Vlad** to discuss how investing in art transcends traditional financial returns. Through the lenses **Fildas Art Foundation** initiatives, the dialogue will highlight the crucial role of family enterprises in championing women artists, supporting young talent, and building an enduring philanthropic legacy that educates and inspires future generations.

**11.15 – 11.35** (20') **Coffee Break**

## BLOCK 2 · THE NEW REALITY OF LONGEVITY: MACRO, DEMOGRAPHICS AND INNOVATION

**11.45 – 12.25** (40') **The Longevity Dividend**
Why longevity and ageing are not the same · How to turn longevity into a growth driver · Adapting investment decision to a longer lifespan **Edoardo Campanella**, Director and Chief Editor of The Investment Institute by UniCredit

**12.25 – 13.05** (40') **The Future of Personal Finance**
How financial systems interact with longer, less predictable lives, and how expectations of those systems are beginning to shift as longevity becomes a lived reality rather than a distant prospect.
**Prof. Lynne Corner**, Deputy Director, UK National Innovation Centre for Ageing (NICA)

**13.05 – 13.35** (30') **Macro Outlook: Romania and CEE in a Longer-Life World**
**Anca Negrescu**, Chief Economist, UniCredit Bank România

**13.35 – 13.40** **Closing remarks**
**Mihaela Lupu**, CEO, UniCredit Bank România

**13.40** **Networking Lunch**

# Our speakers

## WELCOME ADDRESS

**Mihaela Lupu, CEO, UniCredit Bank Romania**



Mihaela Lupu is CEO and President of the Board of Directors of UniCredit Bank Romania. With more than 27 years of experience within the UniCredit Group, she has held senior leadership roles across finance, strategy, capital management and business transformation at both local and international level. Prior to becoming CEO, she served as CFO for UniCredit's Central and Eastern Europe region and led Group Planning, Capital Management & Strategic ALM. She has been closely involved in some of Romania's most significant banking integration and consolidation projects, bringing extensive expertise in strategic growth, financial leadership and organizational transformation.

## THE FUTURE OF PERSONAL FINANCE

**Prof. Lynne Corner, Deputy Director, UK National Innovation Centre for Ageing (NICA)**



Professor Lynne Corner is Deputy Director of the UK National Innovation Centre for Ageing (NICA) and Director of VOICE, an international organisation established in 2010 to value and harness the experience, ideas and insights of the public, especially older people, in the development of products, services and research for healthy longevity. She works directly with research organisations and businesses, from start-ups to corporates, to identify and address the unmet needs of older people, with a particular interest in women's health and wellbeing and in the effective use of data and AI to inform approaches and solutions for healthy longevity. She is a Trustee of the Lewy Body Dementia Society.

## FAMILY WEALTH LONGEVITY: LESSONS FROM AROUND THE WORLD ABOUT WHAT IT IS AND HOW TO ACHIEVE IT

**Prof. Patricia Angus, Founder, Global Family Enterprise Program, Columbia Business School**



Patricia Angus, JD, MIA, TEP, is a thought leader in the field of multi-generational family governance, wealth, and philanthropy. She has been advising global families and their businesses, family offices, and foundations, for more than three decades. A former international lawyer, she leads Angus Advisory Group LLC, an independent consulting practice that advises select families around the world. She founded the Global Family Enterprise Program at Columbia Business School, where she is an Adjunct Professor and teaches graduate MBA and executive education courses. She presents online and in person educational sessions for families and advisors, including in the University of Chicago Booth School Private Wealth Management program. She has served on family business and family office boards and is a member of the Washington DC Estate Planning Council, STEP International, and a Fellow of the Family Firm Institute. She is the author of numerous publications including The Beneficiary Primer and the Trustee Primer and is a frequent speaker at industry and family events. Professional recognition includes Top 50 Women in Wealth Management by Wealth Manager, the FFI Interdisciplinary Award, consistent inclusion in the CityWealth Leaders List, along with being featured in publications including the New York Times, Financial Times, Wall Street Journal, and the Netflix documentary Dynasty: The Murdochs.

# Our speakers

## INVESTING FOR THE LONG RUN: A CONVERSATION

**John "Chip" Montgomery, President, Rockefeller Global Investment Management International**



John "Chip" Montgomery is President of Rockefeller Global Investment Management International. He is responsible for providing strategic leadership, relationship management and distribution across non-US regions including the UK, Europe, the Middle East and Asia, as well as oversight of the firm's London office and regulatory affairs. He previously served as Head of Business Strategy and Corporate Development across Rockefeller Asset Management, focused on the expansion of products and territories through organic and inorganic growth initiatives. Prior to Rockefeller, he was a Managing Director at Bank of America Merrill Lynch, managing key institutional client relationships including traditional and alternative asset managers, universal banks and sovereign wealth funds, and held senior capital markets roles at Société Générale, UBS and Paine Webber. He holds a B.S. in Business Administration from Skidmore College.

**Claudia Vacanti, Responsible for CE&EE Funds Business Development, UniCredit**



Claudia Vacanti leads Group Investment Product Solutions at UniCredit, where she is responsible for zzthe design and development of the Group's investment product offering for clients across its markets, including the onemarkets Fund family developed together with leading international asset managers. She moderates the closing panel of the Forum.

## MACRO OUTLOOK: ROMANIA AND CEE IN A LONGER-LIFE WORLD

**Anca Negrescu, Chief Economist, UniCredit Bank România**



Anca Negrescu is Chief Economist of UniCredit Bank Romania. She covers the Romanian and Central and Eastern European macroeconomic outlook, with a focus on growth, fiscal and monetary policy, and regularly presents the bank's forecasts to investors, clients and the media in Romania and abroad.

## THE LONGEVITY DIVIDEND

**Edoardo Campanella, Director and Chief Editor of The Investment Institute by UniCredit**



Besides his role at UniCredit, Edoardo is also a Research Fellow at Harvard University and author of the book Anglo Nostalgia: The Politics of Emotion in a Fractured West (Oxford University Press/ Hurst). For UniCredit, he writes a biweekly newsletter on macroeconomic and geopolitical issues that is distributed to more than 30,000 subscribers across Europe. His articles have appeared, among others, in Foreign Affairs, Foreign Policy, Project Syndicate, and Financial Times. He is the author of two narrative podcasts in Italian: one on the history of money and another on the history of capitalism. He was the lead author of the report for the Trilateral Commission, A New Spirit of Capitalism, for which he coordinated a prominent international taskforce. His latest book, The Age of Bullying, has just been released in Italian.

# Our speakers

## BEYOND CAPITAL: ART COLLECTION AS AN INVESTMENT BRIDGE ACROSS GENERATIONS

**Raluca Michailov, Owner of Forbes Romania & Moldova**



Raluca Michailov is the owner of Forbes Romania and Forbes Moldova—two media organizations firmly established as leaders in the fields of business and lifestyle journalism and events within both countries. She also publishes the magazines *Forbes Woman*, *Forbes Life*, and *Forbes Kids*, as well as high-end watch and jewelry magazine Lifetime, distributed across two continents.

She acts as a driving force and catalyst for a business community distinguished by its cohesion, dynamism, and innovation.
Furthermore, she promotes Romanian businesses internationally through events and networking initiatives across Europe and the United States.
She is the owner of *Lifetime*, a magazine dedicated to watches and jewelry. It ranks among the top publications in this niche across Romania, Austria, Germany, Switzerland, the United Kingdom, and the United States, with an additional presence in France and Italy.
Her mission is to strengthen and promote the Romanian business community beyond national borders. Through her current and future projects, she also aims to add a new dimension to quality of life and the management of challenges—for both women and men within the business landscape.
Through *Forbes Kids*—encompassing both a publication and various events—she has launched and solidified initiatives designed to contribute to an improved quality of life for children in Romania.

**Anca Vlad, Founder of Fildas-Catena Group**



Anca Vlad, founder of Fildas-Catena Group, built a business from the ground up that has become a leading name in Romania's pharmaceutical distribution and retail sectors in the post-1990 era. She began with a marketing consultancy and, in 1991, launched Fildas, a distributor of pharmaceutical and cosmetic products, with just seven employees. In 1999, she entered the retail market by acquiring a network of 30 pharmacies, laying the foundations for the Catena brand. Today, the network comprises 1,000 pharmacies, and the group employs nearly 10,000 people.
Catena's greatest achievement, however, is the loyalty of nearly five million customers across all generations who regularly visit its pharmacies. Nationwide, the group operates 16 energy-neutral warehouses and a fleet of more than 200 delivery vehicles. Alexandru Vlad, the founder's son and a graduate of the University of Cambridge and University College London, currently serves as the group's president.
Beyond business, Anca Vlad supports culture and social responsibility through the Fildas Art Foundation and her involvement in charitable initiatives run by organizations such as Save the Children Romania and Hospice Casa Speranței. Her passion for the visual arts inspired Vila Catena, a project that brings works by Romanian masters closer to the public. Recognized by Forbes Romania as one of the country's most powerful women, Anca Vlad combines entrepreneurial excellence with a commitment to culture and social causes.