

ETF DONOSTIA

28-31
JULY
2022

20
22

SAN
SEBASTIAN
SPAIN



ABOUT



ETF DONOSTIA

Founded as a “Davos of ETFs”, ETF Donostia aims to bring together a like-minded group of industry leaders, investor advocates and creative minds.

A curated invitation-only event, the group aims to use outside-the-box thinking to improve the ETF industry and improve outcomes for investors around the world.”

OUR AGENDA

WORLD CLASS PARTICIPANTS ⇨

DEEP DIVE DISCUSSIONS ⇨

PARTNERSHIP NETWORKING ⇨

MEMORABLE MEALS, MUSIC AND ACTIVITIES ⇨⇨⇨



Wed 27th

Pre-ETF Donostia

Who: Those who have signed up for the pre-event Michelin dinner.

How: Make your way by taxi or walking (taking the funicular down from the hotel and walking along the beach) 10 min taxi, 50 minute ride and walk.

Where: From 7:00 p.m. drinks on Jim at the [Blind Pig](#) speakeasy bar (formerly Alkimia) 21-23 San Bartolome.

Main Course: 8:30 p.m. dinner at [Amelia](#) [28 Zubieta].

Return: 11:30 p.m. [more or less] via taxis.

There are now 26 of us confirmed for 2-star Michelin restaurant Amelia at 8:30 p.m.

For any who are interested, we can meet for a pre-dinner cocktail at my bar (the Blind Pig), now run by the chef of Amelia from 7:00 p.m.

It is a short walk to Amelia from there. Each as you know is responsible for their own expenses.

Amelia is at the cutting edge of San Sebastian Gastronomy now and has 2 Michelin stars and is headed for 3.

Thu 28th

Optional Morning Plan

For the 26 of us who came early for the pre-opening dinner there will be the early morning option to swim to the island. Meet at 8:00 a.m. at the statue of the Queen in the middle of the Ondaretta beach - go down the funicular train from the hote and walk across the beach looking about 50 meters inland for the stature of the Queen (Maria Cristina) and to enjoy an optional guided hike after. Bring swimming and hiking gear!

Official Opening Reception

When: 6:30 p.m. bus pickup at the conference hotel.

Where: 7:00 p.m. aperitif and tour of Chillida Leku museum.

Main Course: 8:30 p.m. outdoor grill and pintxos dinner.

Return: 11:00 p.m. [more or less] bus returns to event hotel.

We have called a late audible on the opening reception and will be hosting it at a truly iconic location for the Basque Country. [Chillida-Leku](#) is an open air museum and sculpture garden that is unique in the art world in a way that calls to mind the spectacular Louisiana art museum in Copenhagen. Paired with the gorgeous artwork of Eduardo Chillida, we'll have outstanding local wines and food from the surrounding Basque country, our star for the evening.

Fri 29th

We have a full day of sessions from 8:00 a.m. breakfast until wrapping up at 5:00 p.m. at the event hotel, which is the spectacularly located [Mercure San Sebastián Monte Igueldo Hotel](#). That evening we have managed to secure the impossible treat of THE favorite Basque restaurant of all the true foodies here, [Elkano](#) in Getaria, world-renowned for its grilled turbot and outlandishly delicious seafood.

We can thank Conor for his family connection there. Otherwise there is no chance we could do this with the large group.

7:30 a.m. - 8:30 a.m	Breakfast is available at the Mercure Monte Igueldo for guests there in the main breakfast space. You can eat breakfast in your hotels before arrival if not at the event hotel. There will be light food and coffee in the meeting room.
8:30 a.m	Meeting room (at the Mercure San Sebastian Monte Igueldo) opens for coffee and light food, which will be available through the morning.
9:00 - 9:30 a.m	Welcome and a brief discussion of the format and organization of the event, Chatham House rules and what all of the new participants can expect: Jim with Dave , Linda , Bruno and Reggie .
9:30 - 10:00 a.m	Who's Who An Introductory session for all 46 of us to briefly introduce ourselves with where we're from, what gets us up in the morning and something the group may not know about us - with an eye on making new and deeper connections throughout the event.
10:00 - 10:45 a.m	"What are the next waves of innovation to power the growth of ETF industry?" We've seen ethical investing and thematic investing as recent examples that have injected more growth opportunities into the industry. What should we expect in the next decade? Moderator: Dave Nadig - Speakers: Alex Vynokur , Bryon Lake and Laura Morrison .
10:45 - 11:15 a.m	<i>And Now For Something Completely Different. The Power of Clarity of Mind</i> An introduction to Aaron Turner on the importance of clear thinking for productivity and life satisfaction. You'll want to get some time with Aaron. Trust us. An introduction and questions from the audience.
11:15 a.m. - 12:00 pm	Break for email and networking.
12:00 - 1:00 p.m	Crypto Potpourri The market has gone bust, but the blockchain is not going anywhere. When will "physical" ETFs hit the market? What are the broader implications for the blockchain in the ETF and index industry in the US and globally? Moderated by Dave Nadig with Greg King , Hany Rashwan and Philippe Naegeli .
1:00 - 2:30 p.m	Lunch break
2:30 - 3:00 p.m	Reimagining Investment Why Modern Portfolio Theory is broken and detached from the real world. This is a brief intro of Jon Lukomnik and his new book and then an open discussion. Open Q&A for Jon and open discussion for the group.
3:00 - 3:30 p.m	Corporate Governance 3.0 - The Coming Revolution Proxy voting is the promise of good stewardship working instead of being an inefficiency. How do we fix it? With Georgia Stewart CEO of Tumelo with Jeff Cruttenden , Steffen Scheuble and Blake Grossman .
3:30 - 4:00 p.m	Building Your Tribe With downstream marketing increasingly important, what are the keys of reaching a younger audience in terms of values, platforms and technologies? Jana Haines , Alex Levis , Kelsey Mowrey and Will Rhind .
4:00 - 4:10 p.m	What can YOU DO for Ukraine? Jim speaks with Alex Vynokur about his non-profit work in the Ukraine and how participants can help.
4:10 - 5:00 p.m	Is the Future of Asset Management WealthTech? Like active ETFs, direct indexing and robos have been the future for some time. What is the state of the FinTech world around investment management. Reggie Browne , Bruno del Ama , Fiona Bassett , Doug Scott .
5:00 - 7:30 p.m	Fresh air, networking and email time.
7:30 p.m	Buses leave from the Mercure Monte Iguldo for El Kano in Getaria. [more or less] return bus to the hotel.
11:30 p.m	[more or less] return bus to the hotel.

Sat 30th

We'll start with a half day of sessions with the San Sebastian bahia as a spectacular backdrop at the hotel. We'll have a world-class paella experience at the [Asador Alaia](#) in Igueldo near the hotel. After a break or a walk, we'll make our way to the [Fantastic Negrito concert](#). We have invited a curated group of leading San Sebastian gastronomic, cultural, political and business leaders to the concert. 50 of them will also join us for dinner at the legendary [Cofradia Vasca de Gastronomía](#). We pulled out all the stops to be able to host the event there. We'll work with 4 great local chefs and a number of wine-makers for a truly memorable meal at the Cofradia [which has an ample terrace with beautiful views of the Parte Vieja].

7:30 a.m. - 8:30 a.m	Breakfast at the Mercure Monte Igueldo for guests there in the main breakfast space (and you can eat breakfast in your hotels before arrival if not at the event hotel).
8:30 a.m	Meeting room opens for coffee and light food available through the morning.
9:00 - 9:30 a.m	Recap of Day 1 and setup for Day 2.
9:30 - 10:10 a.m	Reimagining Yourself Many of us have or are moving to new ventures. How do we rethink ourselves and focus on building impact and legacy in a challenging global environment. Peter McKillop , Bruno del Ama , Laura Morrison , Jeff Cruttenden . Lightning round introductions to new participant ventures - New participants introduce themselves to the group by speaking for 5 minutes about their ventures and their aspirations - with minutes for questions from audience members. 10:10 - 10:20: Philippe Naegli - GenTwo 10:20 - 10:30: Kelsey Mowrey - Motley Fool Funds 10:30 - 10:40 : Terry Norman - Blue Tractor 10:40 - 10:50: Georgia Stewart - Tumelo 10:50 - 11:00: Ugo Egbunike - Jane Street
11:00 a.m. - 11:45 p.m	What do you MEAN? Your message and how you deliver it becomes more important every year. What are you saying and how and where should you be saying it? Alex Levis , Steve Cohen , Steve Hawkins , Derek Wojnar .
11:45 p.m. - 12:00 p.m	Wrap-Up and Takeaways Quick feedback on the event and connection points after - Jim , Linda , Reggie , Bruno .
12:00 p.m. - 1:00 p.m	Encore! We take a quick vote on what we want to talk about MORE. In the tradition of our grab bag sessions in the past, but with a whole event to give us ideas.
1:30 p.m	Lunch at the nearby Asador Alaia for some great paella. 3 minute walk from the event hotel.
3:30 p.m. - 5:30 p.m	Rest and refresh - maybe a quick swim to the island!
5:30 p.m	Bus departs from the Mercure Monte Igueldo to the pre-concert [gates open at 6 p.m., for ETF Donostia people a bit before].
7:00 p.m. - 9:00 p.m	Fantastic Negrito private concert on the lower (beach) terrace behind the Kursaal. We'll be joined by a few hundred specially invited locals together with a taco truck and unlimited cold beverages.
9:00 p.m. - midnight	4 chef dinner at the Cofradia Vasca de Gastronomía in the heart of the Parte Vieja. With the very best offering from 4 of the most interesting young chefs in Spain, together with a large array of fabulous wines to taste, cider from the barrel and great local beers. At midnight - we'll release you into the wilds of the very festive Parte Vieja.
midnight, 1 a.m., 2 a.m	Getting back to the hotel Buses returning to the Mercure Monte Igueldo at midnight, 1 a.m., 2 a.m. from the Boulevard. If you make it past that, grab a taxi on the Boulevard.

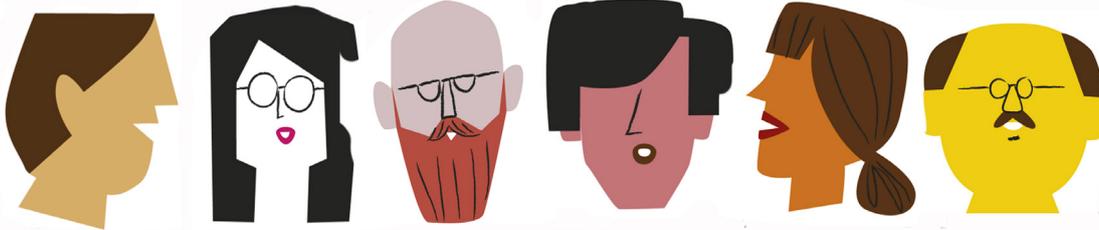
Sun 31th

As a bonus for the oenophiles of the group will be a wine-soaked last lunch at Rekondo, which many of you have been to and is home to the best collection of wine in Spain and one of the best collections of wine in the world.

This lunch is booked fully with 10 of us. It is scheduled for 2:00 pm.

ATTEENDEES

Our attendees represent the global ETF and index industry with special invites bringing diverse perspectives on where asset management is headed.



Fiona Bassett
Deutsche Bank

Nic Harcourt
Spark Network

Michael O'Riordan
Blackwater Research

Reggie Browne
GTS

Steve Hawkins
Horizons ETFs

Will Rhind
Granite Shares

Steve Cohen
ProShares

John Hyland
Consultant and advisor

Hany Rashwan
21 Shares

Jeff Cruttenden
The Treasury

Greg King
Osprey Funda and REX Shares

Telmo Rueda
Tidal

Ben Cukier
Centana

Bryon Lake
JP Morgan

Steffen Scheuble
Solactive

John Davies
Basil Consulting

Alex Levis
Arro Communications

Steven Schoenfeld
MarketVector Indexes

Bruno del Ama
FinRebel

Jon Lukomnik
Spark Network

Doug Scott
Ethic

Ugo Egbunike
Jane Street

Peter McKillop
Climate and Capital Media

Georgia Stewart
Tumelo

Lucas Erth
Gen Two

Manooj Mistrey
HAN

Dina Ting
Franklin Templeton

Deborah Fuhr
ETFGI

Laura Morrison
Direxion

Aaron Turner
OneThought

David Garff
Accuvest

Kelsey Mowrey
Motley Fool Funds

Mike Venuto
Tidal

Kevin Gopaul
BMO

Dave Nadig
ETF Trends

Alex Vynokur
BetaShares

Barnaby Grist
Consultant and board member

Phillippe Naegeli
Gen Two

Jim Wiandt
Spark Network

Blake Grossman
CHJ Capital

Terry Norman
Blue Tractor Group

Darek Wojnar
Northern Trust

Jana Haines
ARK

Conor O'hAonghusa
Spark Network

Linda Zhang
Purview Investments

PLAN YOUR TRIP

Book Your Hotel

Event Hotel - where discussion sessions happen.
Mercure San Sebastián Monte Igueldo
PASEO DEL FARO, 134
20008 SAN SEBASTIAN
ESPAÑA

The event hotel is sold out. If you have not yet booked your hotel, there are still rooms available in San Sebastián.
Please contact conor@sparknetwork.com or jim@sparknetwork.com if you need help finding nearby hotels.

Below in the important information section at the end of this document we list a few hotels that still do have availability.

Getting There

There are 3 airports you can take to fly in



Bilbao airport (BIO)

Is generally the best connected airport.

Taxis are available directly from the curb outside of baggage claim. You can take the taxi directly to the Mercure Monte Igueldo Hotel for roughly €180.



There is a good bus for €17 that leaves at 45 past the hour, every hour from 7:45 – 23:45. It is a Pesa/Lurralde bus [50 to San Sebastián/Donostia] toward the front of the inside curb just outside baggage claim. It will take you to the bus station where you can catch a short taxi ride for approximately €15 to the Mercure Monte Igueldo from the main station in front of where the trains depart.



San Sebastian airport (EAS)

This is the closest airport but really only has flights inside Spain, mainly confining you to Iberia.

You'll take a 20 minute, €50ish taxi to the conference hotel.



Biarritz airport (BIQ)

is fairly well connected and is not far.

Taxis are available immediately outside the airport to take you directly to the Mercure Monte Igueldo hotel in San Sebastián for approximately €150.



Buses to San Sebastián via Conde, Bla Bla Car and Euyrolines - check Omlo.com for times.

They are 45 minutes to an hour and are €7 or less. Again, the bus station in San Sebastián is a short 10 euro taxi to the Mercure Monte Igueldo.



IMPORTANT

COVID policy

We want to maximize the chances that everyone returns home healthy. Please **provide a COVID test taken within 24 hours of your departure.**

If you have not taken a COVID test, we WILL have self tests available for you here in San Sebastian. These tests are necessary whether you are vaccinated or not. Thanks for your understanding on this.

Also - you probably already know this, but to come into Spain you either need to demonstrate that:

1) **you are fully vaccinated** or
2) **have had a PCR test 72 hours before** your travel or an antigen test 24 hours before your travel. You will need to demonstrate this by completing the Spain Health Travel form unless you have an EU COVID pass.

Trouble? We'll fix it!

So that you have it,

Jim will have his US mobile phone and it is always on: **+34.646.982.5454.**
WhatsApp is always the easiest way to connect to me (Jim).
Email is always on as well: jim@sparknetwork.com.

Conor will be also available for help.
He's reachable at **+34.634.41.46.93.** (WhatsApp or mobile) or
at Conor@sparknetwork.com.

If you are lost or confused or have any questions, please just reach out.

Hotel Address

Hotel Mercure San Sebastián Monte Igueldo.
Paseo del Faro 134 | 20008 San Sebastián

Any taxi driver is going to know it as "Hotel Monte Igueldo" in San Sebastian.
All sessions will be here as well as lunch Friday (and lunch Saturday is on the adjacent property at Alaia). I know a number of you are staying off campus.

Buses will leave from this hotel to dinners and activities as noted.
You can also take a taxi directly to the dinners as well.

Alternate Hotels

The Mercure Monte Igueldo is sold out (as is the Akelarre).

There are a number of good hotels nearby that do still have space as of now:

[Barcelo Costa Vasca](#) [great gym, nearby, newly renovated],
[Hotel NH Aránzazu](#) [nearby, nice, good value],
[Hotel Londres](#) [nicest in town, on the beach],
[Hotel Catalonia](#) [decent gym, central, brand new].

Dress code

There is no dress code, but for most of the restaurants the expected dress will be smart casual. On the casual end you could wear jeans and a nice shirt. More formally you could wear a jacket or skirt if you like.

For the concert and dinner on Saturday, dress comfortably. It will be warm and sunny (we hope!) at the concert, but may be cooler later if it becomes a late night after the dinner.

The weather

Temperatures should be in the 20'sC (70s or 80sF) and around 20 (upper 60's) at night. The forecast looks pretty good with no extreme heat predicted. There is a bit of rain in the forecast (though as of now not for the dates of our big outdoor concert on 7/30) so you may want to consider an umbrella for especially the 7/28 tour of Chillida-Leku. Generally be sheltered if it does rain. But Chillida-Leku does involve some outdoor walking to tour the outdoor museum.

Currency

It would be a good idea for you to have some euros for the trip (the bus at the airports for example, take cash only, though you can buy a ticket with a credit card in the machines before you take the bus. In Bilbao, there are cash machines in both the arrivals and departures levels. Biarritz airport also has an ATM.

Download before your trip



We have some great podcasts that are very pertinent to our group and our sessions. We'd recommend you download the following for the flight over!

[FANTASTIC NEGRITO](#) [performing for us] on the Jon Lukomnik Outside In podcast

[KELSEY MOWREY](#) [special invite from Motley Fool Funds] on the Jim Wiandt Pennies from Heaven podcast

[PETER MCKILLOP](#) [from Climate and Capital Media] on the Jon Lukomnik Outside In podcast

[REGGIE BROWNE](#) on the Nic Harcourt Sound of Success podcast

[JONTY HURWITZ](#) from Daizy on the Jon Lukomnik Outside In podcast

[JAN VAN ECK](#) on the Jon Lukomnik Outside In podcast

[DAVID SOLOMON](#) from Goldman Sachs on the Nic Harcourt Sound of Success podcast

Also - for the plane ride back, in addition to a snazzy ETF Donostia Fantastic Negrito concert t-shirt, you'll all also get an autographed (compact!) copy of Jon Lukomnik's ground-breaking book,

Moving Beyond Modern Portfolio Theory - Investing that Matters.

See you all soon!!!