**BRAZIL SPEECH BACKGROUND & CONTEXT**

**FORMAT**

30 mins VIP reception with photos (60 people)

60 min Q&A moderated by Fernando Ferreira and Rachel Sa (both senior XP partners). This will be open to media and on camera.

**AUDIENCE**

There will be 8,000 in person attendees at the conference, paying $200 each, and many thousands more accessing the live stream. The vast majority will be Brazilian. The event is in English with translation available for those who need it.

Attendees are all finance professionals. Most of them will be naturally right-leaning, whereas the media attending are expected to be more left-leaning. Former Finance Minister Guedes got a standing ovation last year – the organisers are interested to see what the reaction to Lula’s new finance minister will be this year.

It's a well known and well respected annual event, always getting good participation from the Brazilian government. XP Investments is a widely known and internationally respected organisation.

Past Speakers include President Bill Clinton, Tony Blair, Secretary Hillary Clinton, Serena Williams, Larry Summers, Malala Yousafzai

**BACKGROUND ON ORGANISATION**

**XP Investimentos**

Founded in 2001 by Guilherme Benchimol and Marcelo Maisonnave, XP Investimentos is a Brazilian brokerage firm focused on providing financial education from investment basics to advanced portfolio management strategies. They initially offered lectures and courses on investment and went on to offer impartial investment opportunities to their clients. Known for their transparency and security, XP Investimentos went from a company of independent investment agents to an investment broker, as they acquired AméricaInvest CCTVM S.A in 2007, allowing them to broker operations regulated security markets. In 2010, XP Investimentos began another area of focus, specializing in fixed income products and platforms for unified distribution of investment funds of the main marketing managers.

In their own words, “In 20 years of existence, XP Investimentos has built a growth and improvement trajectory in the provision of investment services. In 2001, Mrs. Guilherme Benchimol and Marcelo Maisonnave founded a company of autonomous investment agents focused on serving small investors not used to stock´s investment.  Since that time, the growth strategy defined by XP Investimentos was based on the clients financial education, initially through courses and lectures, and then offering investment opportunities in an impartial manner. Basically, XP Investimentos provide a service to allow its customers to invest better, with more transparency and security.

The strategy was successful, and in a few years XP Investimentos grew exponentially. It was necessary, therefore, for the company of independent investment agents to become an investment broker. Thus, in 2007, XP Investimentos acquired AméricaInvest CCTVM S.A., becoming a brokerage firm able to broker operations on regulated securities markets. After the acquisition, XP Investimentos gained even more relevance in the financial investment market and, consequently, diversified its activities. In 2009, it started the activity of insurance brokers and, in 2010 it inaugurated the area focused on offering fixed income products and the platform for unified distribution of investment funds of the main market managers.

The success of the business model implemented by XP Investimentos attracted two renowned private equity funds, the British fund Actis and the American fund General Atlantic, which made minority investments in XP Investimentos in 2010 and 2012, respectively. In 2017, Banco Itaú also acquired a minority stake in the company. Such investments made the XP Group even more solid, with a higher level of corporate governance and the strategic and financial support needed to diversify its business. Because of that, the XP Group started to follow an expansion strategy though partnerships and acquisition of businesses that presented synergy with the business developed by XP Investimentos.”

**Company Website:** [www.xp.com.br](http://www.xp.com.br)