



Evolve, Empower, Energize -
Transforming Sales & Marketing
through Data & AI

SME
THE FORUM

AGENDA

Monday, Oct. 27

All Day: Arrivals and Check-In

5:30 – 8:00 PM: Welcome Reception

Tuesday, Oct. 28

8:00 AM: Registration and Networking Hot Breakfast

9:00 AM: Welcome from the SME Forum

9:30 AM: *The Acceleration of AI Capabilities for Asset Management*, Alec Crawford, CEO (AICRisk)

10:15 AM: Networking Break

10:30 AM: Tuesday Morning Breakout Sessions:

	Sales & Distribution	<i>Sales Enablement Integration</i>
	Marketing	<i>Content Creation and Curation w/ AI</i>
	Data, Tech & AI	<i>Dashboards Best Practices</i>
	Solutions Workshop	Xalt – Accelerating Go-to-Market Success

12:00 PM: Networking Sit Down Lunch

1:30 PM: *Panel Discussion* - How modern technology is reshaping distribution and organizational strategy

2:15PM: Tuesday Afternoon Breakout Sessions:

	Sales & Distribution	<i>Institutional Distribution Challenges</i>
	Marketing	<i>Products & Relationships</i>
	Data, Tech & AI	<i>Client Segmentation Strategies</i>
	Solutions Workshop	Kyloe - Break out of the Cell - how much Excel is too much?

3:45 PM: Networking Break

4:00 PM: *What's an AI Agent—and Can I Use One Without Breaking Compliance?* - HSO

4:45 PM *Final Thoughts Day 1*

5:30–8:00 Onsite Reception and Sit-Down Dinner at Hotel Restaurant

Breakout Rooms:



Evolve, Empower, Energize -
Transforming Sales & Marketing
through Data & AI



AGENDA

Wednesday, Oct. 29

7:30 AM: Registration and Networking Hot Breakfast

8:00 AM: AI Challenges Benchmark Study - Loren Fox (Fuse Research)

8:30 AM: Blueprintx – Compliant Content at the Speed of AI

9:15 AM: Wednesday Morning Breakout Sessions:

Sales & Distribution	<i>Mobile CRM – Success Stories</i>
Marketing	<i>Marketing Technology – Key Solutions to Drive Activity</i>
Data, Tech & AI	<i>AI to enhance the customer experience</i>
Solutions Workshop	<i>HSO - AI Agents in Action: How to Move from Use Case to MVP</i>

10:45 AM: Networking Break

11:00 AM: How to go to market at scale for Marketing and Sales – Greg Healy, CEO, Synthesis Technology
Fireside Chat with Lara Hoffmans, Managing Director of Marketing, Diamond Hill Investment Group

11:45 AM: AI is solving distribution's pain points today.- SS&C

12:30 PM: Networking Sit Down Lunch

1:30 PM: Wednesday Afternoon Breakout Sessions:

Sales & Distribution	<i>Harvesting Sales and Marketing Activity</i>
Marketing	<i>Driving Activity for the RIA Channel</i>
Data, Tech & AI	<i>Personalization of Sales using AI</i>
Solutions Workshop	<i>SalesPage – From Resistance to Resilience: Leading People Through Disruption</i>

3:00 PM: Closing Reception and Networking – **Sponsor: SalesPage**

5:00 PM: Forum Concludes and Departures

6:30 PM: Leadership Council Offsite Dinner (by invitation)

Thursday, Oct. 30 SME Leadership Council (by invitation)

8:00 AM: Leadership Council Breakfast and Meetings

11:30 AM: Meeting Concludes and Departures

Breakout Rooms: