

# Agenda

## Monday, April 6

- All Day:** Arrivals and Check-In  
**5:30 – 8:00 PM:** Welcome Reception

## Tuesday, April 7

- 8:00 AM:** Registration and Networking Hot Breakfast  
**8:30-9:00 AM:** Welcome, Registration & Opening Remarks:  
**9:00 - 9:45 AM:** **Opening Keynote, Stephen Alepa, CEO - Olmstead Consulting**  
**9:45 - 10:00 AM:** Networking Break  
**10:00 - 11:30 AM:** **Tuesday Morning Breakout Sessions:**

- 
- |                  |  |
|------------------|--|
| <b>Session 1</b> | The Near-Term Automation Opportunity: What Distribution Can Hand-Off to AI Now |
| <b>Session 2</b> | What Sales Teams Actually Want from AI and Technology                          |
| <b>Session 3</b> | Institutional Focus Session: What's Unique—and What Isn't                      |
| <b>Session 4</b> | Data Management Strategy: Preventing the CRM "Data Black Hole"                 |
- 

- 11:45 - 12:30 PM:** **A Day-in-the-Life Approach to Modern Enablement for The Future of Analytics Capabilities, Synfinii**  
**12:30 - 2:00 pm:** Networking Lunch  
**2:00 - 2:45 PM:** **Panel Discussion - Innovations that Improve the External Sales Process.**  
**2:45 - 3:00 PM:** Networking Break  
**3:00 - 4:30 PM:** **Tuesday Afternoon Breakout Sessions:**

- 
- |                  |  |
|------------------|--|
| <b>Session 5</b> | Activity Capture in CRM: Getting Sales to Log What Actually Matters              |
| <b>Session 6</b> | Data Integration Challenges and Solutions  |
| <b>Session 7</b> | CRM for Institutional Distribution: Data Models, Integration, and Best Practices |
| <b>Session 8</b> | AI, Compliance, and Control: What's Allowed, What's Risky, What's Next           |
-

- 4:30 - 4:45 PM:**      Networking Break
- 4:45 - 5:30 PM:**      **Peer Exchange: Structured Networking: Fast, Focused, Peer-Driven**
- 5:30 PM:**              **Evening Reception**

## Wednesday, April 8

- 7:30 AM:**              Registration and Networking Hot Breakfast
- 8:15 AM:**              Welcome and Morning Kickoff
- 8:30 - 9:15 AM:**      **Panel Discussion - The Challenge of the AI Build Out – Insource or Outsource? Moderated by SS&C**
- 9:15 - 9:30 AM:**      Networking Break
- 9:30 - 11:00 AM:**    **Wednesday Morning Breakout Sessions:**

---

<b>Session 9</b>	Data Integration Without a Channel Lens
<b>Session 10</b>	Alternatives Distribution in Asset Management
<b>Session 11</b>	How to solve the Institutional Onboarding challenge?
<b>Session 12</b>	Data ROI Reality Check: Why No One Can Prove It (Yet)

---

- 11:00 - 11:15 AM:**    Networking Break
- 11:15 - 12:00 PM:**    **Panel Discussion: Are Your Data Foundations Ready for AI?**
- 12:00 - 12:45 PM:**    **Member Survey Results: Business Intelligence Organizational Alignment & Initiatives, Loren Fox, Fuse Research**
- 12:45 - 2:00 PM:**    Networking Lunch
- 2:00 - 3:30 PM:**      **Wednesday Afternoon Breakout Sessions**

---

<b>Session 13</b>	AI Metrics That Matter: How KPIs Are Evolving
<b>Session 14</b>	Improving Sales Conversations with Marketing Content
<b>Session 15</b>	AI Agent Use Cases: Vendor Solution – HSO

---

- 3:30 - 4:00 PM:**      **Closing Session: From Ideas to Action: What Are You Taking Back?**
- 4:00 PM:**              **Closing Reception**
- 4:30 PM:**              Conference Concludes