

DAY 1 - From Insight to Action: Turning Data, AI, and Strategy into Results

7:45 | *Networking Breakfast*

8:30 | Welcome, Registration & Opening Remarks

- Forum overview, goals, and themes
- How the next two days will balance innovation, execution, and peer exchange

9:00-9:45 | Opening Keynote – Broadridge: From Challenges to Solutions in Asset Management

Davis Walmsley, Head of US Distribution Solutions, Broadridge - A candid look at the industry's biggest pain points—followed by what's actually working. This session sets the tone by moving beyond identifying problems to showcasing real, implemented solutions across distribution, marketing, and operations.

9:45-10:00 | *Networking Break*

10:00-11:30 | Breakout Sessions

1. Data Integration vs. AI – Where to Focus First?
2. Driving Workflow through Automation
3. Meeting Prep – From Concept to Field Adoption
4. Data Governance Strategies

11:45-12:30 | Saasocalypse - Which technologies firms are not renewing and why

Wyatt Bales, Head of Solutions, North America, Bluprintx - Firms are investing in headless CRM and deprecating a number of supporting marketing and sales SaaS applications. In this session, we'll walk through real roadmap examples of where firms are investing and where they're not. We'll also discuss the underlying reasons (e.g. vendors forcing consolidation to specific tools which use ingestion-based pricing).

12:30-2:00 | *Networking Lunch*

2:00-2:45 | Panel Discussion: AI Adoption – Lessons from the Front Lines

Moderator: Marc Barrachin, Global Head of Products IIS Market Intelligence, Panelists: Jon Rosenberg, Neuberger, Victoria Savio, Financial Services Exec., David Neves, PGIM - An interactive discussion on the real-world adoption of AI, exploring successful and challenged use cases, AI tools and infrastructure, risk management, workforce upskilling, lessons learned, and how firms are building partnerships to support AI initiatives.

2:45-3:00 | *Networking Break*

3:00- 4:30 | Breakout Sessions

5. The Evolving Role of Data in Distribution Organizations
6. AI for Data & Analytics
7. Modern Marketing Enablement & Email Outreach
8. Building a Data Strategy That Actually Gets Funded

4:30-4:45 | *Networking Break*

4:45-5:30 | Fireside Chat with John Carroll – Financial Services Executive

Leadership Insights and how to address today's Industry Challenges

5:30 | Evening Reception & Dinner: Short Hills Hilton

DAY 2 - From Insight to Action: Turning Data, AI, and Strategy into Results

7:30 | *Networking Breakfast*

8:15 | **Morning Kickoff**

8:30-9:15 | **Panel Discussion: SS&C - What Sales Teams Actually Want from Data & Technology**

Moderator: Lee Kowarski, SS&C, Head of Product, SS&C – Panelists: Wholesalers - Drew Good - KKR Kevin Golden - Franklin Templeton, Alex Katz – Thornburg - A candid look at the industry's biggest pain points - followed by what's actually working. This session sets the tone by moving beyond identifying problems to showcasing real, implemented solutions across distribution, marketing, and operations.

9:15-9:30 | *Networking Break*

9:30-11:00 | **Breakout Sessions**

- 9. Structuring Data for AI Success
- 10. Implementing AI Across the Client Management Lifecycle
- 11. Client Onboarding – Removing Bottlenecks in Institutional Workflows
- 12. CRM Best Practices – Design, Data & Adoption

11:00-11:15 | *Networking Break*

11:15-12:00 | **Your Distinct Distribution Advantage: Where Strategy, Data, and AI Come Together**

Rubesh Jacobs, Managing Partner, Jacobs & Co. & Aric Faber, CEO, Synfinii - The session will explore what it takes to build a deterministic data foundation and why your firm's unique GTM strategy needs to shape how AI is put to work. The result: faster ROI from your investments in data and AI by putting your distinct distribution advantage to work at scale.

12:00-1:00 | *Networking Lunch*

1:00-1:45 | **Autonomous CRM Messaging: From Marketing Signal to Client Conversation**

J.T. Tripple & Mike Hammonds, HSO, Amanda Vasquez, GW&K Investments, Senior Business Intel. & Solutions Architect - Taking us through a rethinking of CRM for Asset Management, how marketing and communications teams can connect engagement, relationship context, and governed AI to help distribution teams act faster.

1:45-2:00 | *Networking Break*

2:00-3:30 | **Breakout Sessions**

- 13. Measuring Sales Success – Beyond Traditional Metrics
- 14. Transforming Customer & Lead Journeys
- 15. Aligning Sales & Marketing Through Data and Campaign Strategy
- 16. Improving Campaign Measurement

3:30 | **Closing Session**

From Ideas to Action: What Are You Taking Back?

Participants share one initiative, one experiment, or one mindset shift they plan to implement after the conference.

4:00 | *Closing Reception*

5:00 | **Conference Close**