



HOLISTIC ADAPTATION OF THE INVESTMENT MANAGEMENT INDUSTRY

AGENDA

IMEA LEADERSHIP SUMMIT • NOVEMBER 8 • LEGG MASON • BALTIMORE, MD

8:00 AM Registration & Continental Breakfast

8:30 AM **Opening Remarks & Introductions**

Kimber Lintz, Director — **IMEA**

Joe Sullivan, Chairman & Chief Executive Officer — **Legg Mason**

Bob Geppner, Executive Vice President, Head of National Sales-U.S. — **Franklin Templeton Investments & Chair** — **IMEA Executive Committee**

9:00 AM **New Ways of Working**

The digital “revolution” has and will fundamentally alter how work gets done. Whether you call this agile or more broadly new ways of working, it’s clear that to fully harness the promise of digital and advanced data analytics, we need to (re)think about how work gets done. One can imagine a future where there aren’t separate sales/marketing organizations, but a cross-function team working together to make things happen. BCG is just beginning research to benchmark where the industry is on adopting these changes and what the key challenges are. BCG will showcase a high-level summary of that research.

Brent Beardsley, Senior Partner and Managing Director — **The Boston Consulting Group**

9:45 AM Break

10:00 AM **Product Trends: Intervals & ESGs**

This panel will discuss the outlook for two trending products and hear first-hand from firms about the opportunities and challenges they’ve faced in those spaces.

Moderator: **Howard Schneider**, President — **Practical Perspectives**

Monem A. Salam, Executive Vice President — **Saturna Capital Corporation**

Kamal Bhatia, Chief Executive Officer & Co-Head of OC Private Capital — **OFI Global and Carlyle Group Joint Venture**

10:45 AM **Diversity & Inclusion: The Evolving Role of Women in Leadership**

Increasing the number of females in leadership roles in the asset management industry is near the top of the priority list as it relates to diversity and inclusion. This discussion will provide an overview of this topic as well as insight from women currently in distribution, product and portfolio management leadership positions. Processes, issues and considerations to help improve the balance will also be discussed.

Moderator: **Kimber Lintz**, Director — **IMEA**

Regina Curry, Chief Diversity Officer — **Legg Mason**

Lynn Paschen, Managing Director & Senior Portfolio Manager — **Charles Schwab Investment Management**

Rachel Schnoll, Managing Director — **Goldman Sachs Asset Management**

11:45 AM

IMEA Education Council

To support the ongoing and evolving education efforts of the organization, the IMEA is launching an Education Council. Jennifer Ball, Council Chair, will share visions, goals and initial initiatives of the Council.

Jennifer Ball, Senior Vice President, Global Product Marketing and Insights —

Franklin Templeton Investments & Chair — **IMEA Education Council**

12:15 PM

Lunch

1:00 PM

Executive Roundtable

Open discussion lead by the IMEA Executive Committee.

2:30 PM

Adjourn