

DIGITAL SUMMIT

MARCH 7 | ST. PETERSBURG, FL | FRANKLIN TEMPLETON INVESTMENTS



- 8:00 AM** Registration & Continental Breakfast
- 8:30 AM** **Opening Remarks & Introductions**
Kimber Lintz, Director — IMEA
Scott Burke, Chair — IMEA Digital Council & Digital Delivery Manager-Americas — Aberdeen Standard Investments
- 9:00 AM** **Modern Tech Trends Reshaping How We Work and How Customers Work With Us**
 Modern technologies powered by artificial intelligence capabilities like machine learning and natural language generation are being used in our everyday experiences. No longer hype or buzz words, they have tangible uses for marketers to obtain real-time insights, gain internal efficiencies, develop relevant customer experiences at scale and create business opportunities. This session will provide perspective from industry leaders and answer questions such as: How can firms start leveraging artificial intelligence capabilities? What are firms already doing? What capabilities do many firms already have in place, and where will this go?
Moderator: **Mike Cogburn**, Head of Marketing Consulting — SS&C Technologies / DST Systems
Julia Binder, Head of Strategic Marketing Research — SS&C Technologies / DST Systems
Jane Conway, Ph.D., Head of Distribution Intelligence & Enablement GIMS USI — T. Rowe Price
Cindy Sealey, Principal, Distribution, Marketing & Client Communications Technology Consulting — Cutter Associates
Deep Ratna Srivastav, Senior Vice President, Head of Client Strategies & Analytics — Franklin Templeton Investments
- 9:45 AM** Break
- 10:00 AM** **Personalization in Asset Management**
 While it is clear personalization drives engagement among customers and prospects, it may not be clear how – and how much – to personalize. Our panel of experts will discuss considerations for digital marketers, such as platforms, content and appropriateness.
Moderator: **Andy Seibert**, Managing Partner — Imprint
Audreia Heisey, Senior Director, Enterprise Asset Management — Seismic
James Keenan, Director, Digital Marketing — AMG Funds
Greg Marscellus, Managing Director, Digital Marketing — Charles Schwab
Tom Tynell, Digital Marketing — Fidelity Investments
- 10:45 AM** **Digital Tools for Advisors: Present & Future**
 Are advisors currently actually utilizing digital tools? If so, which tools and which advisors? As the group of financial advisors continues to age, do asset management firms need to shift their focus to younger financial professionals and winning their business? Corporate Insight will share the findings from their recent advisor survey to help firms better understand how advisors are and will use and value digital and practice management tools. Putnam and AllianceBernstein will also share their perspective on the benefits of providing digital tools and how they can help strengthen advisor relationships.
Moderator: **Michael Ellison**, President — Corporate Insight
Koley Corte, Senior Vice President & Global Head of Business Transformation — AllianceBernstein
Mark McKenna, Head of Global Marketing — Putnam Investments
Lauren Roncevic, Director of Research, Asset Management and P&C Insurance — Corporate Insight

11:30 AM | **Digital First — What's the Goal?**

What does digital first mean, and how do you know if you're there? Hear from asset managers about how to get to a "digital first" state including challenges and solutions so far; what works and doesn't work in digital format; and why firms may need to rethink content strategies based on current client consumption.

Moderator: **Pete Tevonian**, Vice President Interactive Marketing — Harbor Funds

John Davis, Director of Communications & Marketing — The Royce Funds

Christopher Young, Director, Financial Services Industry Strategy — Adobe

12:15 PM | Break

12:30 PM | **Working Lunch & Roundtable Discussion**

This intimate, interactive format enables presenters and participants to candidly discuss topics ranging from the day's agenda to other critical business management issues.

2:30 PM | Adjourn



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