

# DISTRIBUTION SUMMIT

MAY 14 | BOSTON | HOST MFS INVESTMENT MANAGEMENT



## TUESDAY, MAY 14 | DISTRIBUTION SUMMIT

**9:00 AM** Registration & Continental Breakfast

**9:30 AM** **Welcome & Opening Remarks**

**Jim Adams**, Managing Director — MFS Funds Distributor, Inc. | IMEA Distribution Council Steering Committee

**Kimber Lintz**, Director — IMEA

**Jill Brown**, President, Principal Funds Distributor | Chair — IMEA Distribution Council

**9:45 AM** **Data Driven Success: How Do We Get There?**

With so much data available, how do firms prioritize the data they have, determine what data they need and identify what data points will help them get where they want to be? This panel of asset management data leaders will share perspectives, successes and challenges around these critical business issues.

*Moderator:* **Ken Burd**, Head of Distribution Intelligence & Sales Enablement — Macquarie Investment Management | MIM Americas

**Rajanpreet Wadhwa**, Director, Client Strategies, Analytics & Technology — Franklin Templeton Investments

**John Pumphrey**, Vice President, Director, Distribution Analytics — Eaton Vance

**10:30 AM** **Data Driven Tools & Strategies**

Having the data is only half the battle. How do you effectively use it? This session will discuss technology tools and strategies that leverage data to enhance client experience strategies and marketing processes that can help you equip your sales team to communicate effectively internally and increase client engagement.

*Moderator:* **Bill Rader**, National Sales Manager Territory Sales — American Century Investments

**Bill Finnegan**, Managing Director, Financial Services Marketing — Seismic

**Farnaz Maters**, Chief Marketing Officer — Principal Global Investors

**Mark McKenna**, Head of Global Marketing — Putnam Investments

**11:15 AM** Break

**11:30 AM** **ETF Model Portfolios: Construction Methodologies & Distribution Trends**

*Moderator:* **Michael Winnick**, Head, Institutional Sales — Charles Schwab Investment Management

**Brett Mossman**, Managing Director, Head of Portfolio Consulting Services — BlackRock

**Jonathan Linstra**, Managing Director, Head of ETF Model Portfolios & Distribution — State Street Global Advisors



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**12:15 PM** Lunch & Networking

**1:00 PM** **The State of US Wealth Management**

In the current environment of accelerating shifts in retail asset management, Patrick Kennedy and Kevin Cho of McKinsey & Company will provide an exploration of trends impacting your clients (Financial Advisors and Wealth Managers), and what's in store for the future of US Wealth Management.

**Kevin Cho**, Associate Partner & Senior Solutions Leader — McKinsey & Company

**Patrick Kennedy**, Associate Partner & Senior Solutions Leader — McKinsey & Company

**1:45 PM** **Alternative Private Investments**

What is the trend with alternative private investment funds? Are investors and advisors asking for this type of investment? And, what do the manufacturers think about this space? This session will explore this unique product area.

*Moderator:* **Stephen Ban**, Managing Director — Nuveen Investments

**Dominick Carlino**, Managing Director, Head of Alternative Investments — Merrill Lynch

**Brody Browe**, Managing Director, Head of Institutional Business Development — FS Investments

**2:30 PM** **Executive Roundtable (Member-Only)**

**4:00 PM** Adjourn

**5:00 PM** Networking Reception  
MFS Investments



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