

DIGITAL SUMMIT

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



Julia Binder, Head of Strategic Marketing Research — SS&C Technologies / DST Systems

Julia writes and presents extensively on marketing strategy, technology and analytics for the asset management industry. Her timely and practical recommendations make her a sought-after expert in building brand awareness, increasing business impact of digital engagement, and using advanced technologies and analytics to create business opportunities.



Scott Burke, Digital Delivery Manager - Americas — Aberdeen Standard Investments

Scott is responsible for overseeing the digital strategy for the Americas business, which includes U.S., Canada and Brazil.



Mike Cogburn, Head of Marketing Consulting — SS&C Technologies / DST Systems

Mike is responsible for creating customized solutions, from cutting-edge strategy and frameworks to tactical recommendations. He specializes in digital strategy and expanding the reach of a firm's marketing efforts, sales force and service.



Jane Conway, Ph.D., Head of Distribution Intelligence & Enablement GIMS USI — T. Rowe Price

Jane works closely with GIMS Intermediary, and Institutional Sales, Marketing and Client Operations teams to develop critical business intelligence and distribution enablement capabilities aligned to deliver on T. Rowe Price's integrated strategic plan.



Koley Corte, Senior Vice President & Global Head of Business Transformation — AllianceBernstein

Koley is responsible for developing transformative growth strategies for next generation institutional and retail distribution. Her areas of current focus include sales enablement, demand generation, robotics and automation, predictive analytics and new channel development.



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

With 30 years of industry experience, John oversees marketing efforts for Royce, a small-cap specialist with a long, successful performance history.



Michael Ellison, President — Corporate Insight

Michael is responsible for Corporate Insight's strategic direction and day-to-day operations.



Bill Finnegan, Managing Director, Financial Services Marketing — Seismic



James Keenan, Director, Digital Marketing — AMG Funds

James focuses on designing and delivering best in class digital solutions to support the firm's distribution efforts. James leads digital transformation projects to modernize, streamline and automate marketing activities across web, email and social channels.



Greg Marscellus, Managing Director, CSIM Digital Marketing — Charles Schwab

Greg and his team are responsible for the B2B online, marketing automation, and analytics strategies used to drive assets under management for Charles Schwab.



David Nguyen, Director of Mobile Strategy — Putnam Investments

David is responsible for mobile strategy and products across Putnam's various lines of businesses. He serves as channel manager for the Putnam and Empower Retirement relationship, helping to lead the design and development of 401(k) participant and plan sponsor digital efforts.



Lauren Roncevic, Director of Research — Corporate Insight

Lauren is responsible for conducting extensive research and competitive benchmarking on the asset management and insurance industries, examining the online platforms and technological innovations that leading firms offer clients, prospects and financial professionals.



Cindy Sealey, Principal, Distribution, Marketing & Client Communications Technology Consulting — Cutter Associates

With over 30 years of experience in the investment management industry, Cindy has consulted to investment firms on their sales & distribution, marketing, product development, consultant relations, client service, and client reporting, data management, and strategic technology direction.



Andy Seibert, Managing Partner — Imprint

Andy founded Imprint as a full-service content marketing agency in 2013 after almost two decades in the custom content industry. He has created successful, long-running content marketing programs that combine a deep understanding of customer behavior with creative talent.



Deep Ratna Srivastav, Senior Vice President, Head of Client Strategies & Analytics — Franklin Templeton Investments

Deep is responsible for leading the strategic initiatives, analytics and campaign efforts for the North America business.



Pete Tevonian, Vice President, Head of Digital Marketing — Harbor Funds

Pete's role is to consider, manage, help design and create all of the digital marketing assets and programs for Harbor Funds.



Tom Tynell, Vice President, Digital Marketing Product Delivery — Fidelity Investments

Tom focuses on the strategic transformation of the marketing team's client facing digital touchpoints as well as providing implementation oversight for the technology projects required to support the Fidelity Institutional digital marketing roadmap.



Christopher Young, Director, Industry Strategy & Marketing - FSI — Adobe

As Director of Industry Strategy for Financial Services at Adobe, Christopher Young leads a team of industry specialists who work with Adobe's financial services clients to help them develop best-in-class digital marketing strategies using Adobe Experience Cloud.