

PRODUCT SUMMIT

MAY 15 | BOSTON | HOST NATIXIS INVESTMENT MANAGERS



WEDNESDAY, MAY 15 | PRODUCT SUMMIT

8:00 AM Registration & Continental Breakfast

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

Jim Cove, Senior Vice President — Natixis Investment Managers

Kimber Lintz, Director — IMEA

Jill Brown, President — Principal Funds Distributor

8:45 AM **Overview of Product Trends/Directions**

Goshka Folda, President & CEO, Investor Economics & Global Head of Research — Strategic Insight

9:15 AM **Discussion about the Growing Interest and Proliferation of Alternative Product Structures**

Asset managers and distribution partners are increasingly assessing a wide range of product structures to package their investment strategies. These structures include interval funds, closed-end funds, private offerings, trusts, ETFs, etc. This session will consider the factors that are driving this proliferation, considerations for asset managers as they develop new product structures, and the demand and interest of distribution partners in these varying structures.

Moderator: **Jeff Vorwerk**, CIMA® Director, Global Product Development — Principal Global Investments

Jason Mandinach, Executive Vice President & Alternative Credit Strategist — PIMCO

Ninon Marapachi, Head of Hedge Fund Origination & Product Management — Bank of America Merrill Lynch

Ron Miller, Executive Director, Investment Solutions — Morgan Stanley

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

Brendan Powers, Associate Director, Product Development — Cerulli Associates

10:00 AM Break

10:15 AM **SMA Product Development Process**

This session will discuss the product development process for SMAs which are gaining wider and wider adoption with distributor firms. What does the product development process look like? What are some of the operational considerations associated with SMAs? What functions are needed to support SMAs? How does SMA product development vary relative to other investment vehicles like mutual funds?

Moderator: **Ashley Wood**, Principal — Strategic Insight

Jim Cove, Senior Vice President, Investment Strategies & Management — Natixis Investment Managers

Sam Marciano, Director, Head of SMA Product Management — Legg Mason

Sharon Wong Hughes, Senior Vice President, Asset Manager Relationship Management — Envestnet

11:00 AM | **Changing Nature of Product Development**

The product development and management process for asset managers is more complex than ever with an increasing proliferation of varying investment vehicles and strategies, and the need to offer more customized and innovative solutions. This session will examine how asset management firms are structured to address these marketplace needs; how the development of various investment vehicles are prioritized; and, how firms are addressing the need for greater customization, etc.

Moderator: **Neil Bathon**, Founder & Partner — FUSE Research Network

Dan Beckman, Head of U.S. Product — Columbia Threadneedle Investments

Jim Hinkley, Head of Product Development — Macquarie Investment Management

Colby Penzone, Head of Investment Product — Fidelity Investments

11:45 AM | **Product Update & Legal Overview**

K&L Gates

12:15 PM | Lunch & Networking

1:00 PM | **Executive Roundtable (Member-Only)**

2:30 PM | Adjourn