AGENDA

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, CIMA, 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**, Global Head of Distribution Intelligence & Sales Enablement — Macquarie Investment Management | MIM Americas

Rajanpreet Wadhwa, Director, Client Data & Analytics — 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, External Sales — American Century Investments

Bill Finnegan, Managing Director, Financial Services Marketing — Seismic

Chris Wilson, Managing Director — Principal Funds Distributor, Inc.

Mark McKenna, Head of Global Marketing — Putnam Investments

11:15 AM Break

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

Asset Managers are rapidly launching ETF model portfolios as model usage increases among financial advisors. In this panel we will explore the offerings of two main ETF model portfolio providers, discuss trends in the development of model portfolios and trends in advisor usage of model portfolios and contemplate the impact ETF model portfolios are having on the asset management industry.

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

Brett Mossman, CAIA, Managing Director, Head of Portfolio Solutions Group — BlackRock

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

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, Senior Solution Leader & Associate Partner — McKinsey & Company

Patrick Kennedy, Senior Solution Leader & Associate Partner — 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: **Jim Adams**, CIMA, Managing Director — MFS Funds Distributor, Inc.

Dominick Carlino, Managing Director — Bank of America/Merrill Lynch — Investment Solutions Group

Brody Browe, CAIA, 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, 35th Floor