

MARKETING SUMMIT

SEPTEMBER 24 | CHICAGO | MID-AMERICA CLUB



DIGITAL COUNCIL ROUNDTABLE

8:30 AM Hot Breakfast Buffet

9:00 AM **Digital Council Roundtable Breakfast**

Leaders in digital strategy will come together for this frank and open dialogue on opportunities and challenges facing Digital teams today.

- Building Scale & Efficiency through Digital
- Decentralizing Digital Marketing Strategy & Digital First
- Other Top-of-Mind Digital Topics

MARKETING SUMMIT

10:00 AM Networking & Registration

10:30 AM **Welcome & Opening Remarks**

Kimber Lintz, Director | [IMEA](#)

Vicki Lester, Chair | [IMEA Marketing Council](#) & Head of Intermediary Marketing | [Columbia Threadneedle Investments](#)

10:45 AM **Marketing in Ascension: From the Shadows to the Spotlight**

With its focus on improving productivity, FUSE guides its clients to higher ROIs for the distribution function. With a properly enabled marketing group being a key factor in future success, FUSE will offer tactical insights from the most successful marketing organizations.

Neil Bathon, Managing Partner | [FUSE Research Network](#)

11:30 AM **Different Ways Data-Driven Marketing Takes Form**

Data continues to be a significant factor in identifying marketing and targeting strategies. You'll hear consultant and asset management firm perspectives on how companies are adapting to this trend as it relates to structuring teams, firm culture and collaboration with sales.

Moderator: **Dave Master**, Chief Marketing Officer | [Janus Henderson Investors](#)

John Przygocki, Vice President, Direct Marketing Engagement | [Legg Mason](#)

Peter Watson, Principal | [Boston Consulting Group](#)

12:15 PM Working Lunch

12:30 PM **Using Storytelling to Build Rapport With Clients & Prospects | *Presentation & Working Lunch***
Client engagement is on every marketer's radar. But shouldn't building the type of 1:1 rapport that sales teams have with clients be the goal? And, if so, how is that achieved? This session will explore the basics of storytelling and provide examples of how this strategy can be used by marketers to gain trust and establish customer rapport leading to engagement. Attendees will participate in an interactive workshop to discuss how storytelling can be applied to current marketing and content strategies at their firms.

Bill Drew, Founder & Chief Storyteller | [Kipling Road](#)

2:00 PM Break

2:15 PM **Morgan Stanley: A Wirehouse Perspective on What is Needed from Asset Managers**
How has the advisor/client relationship changed as a result of new industry regulations, digital disruption and demand for improved client experiences? Morgan Stanley will provide their viewpoint on these issues and how that changes what they want and need from asset managers now and in the future.

Jim McCarthy, Head of National Sales, Managing Director | [Morgan Stanley](#)

3:00 PM **Advisor Education: What's Resonating**
Advisors' top requests from investment managers continue to be programs and materials to help build their practices and educate clients. This session will highlight efforts from industry leaders T. Rowe Price and Nationwide who will share what's working, measuring success, and home office feedback.

Keith D. Bernard, Associate Vice President | [Nationwide](#)

Marcie Daniel, Head of Non-Product Offers | [T. Rowe Price](#)

3:45 PM **Marketing Council Sponsor Remarks**
Bill Finnegan, Managing Director, Financial Services Marketing | [Seismic](#)

Break

4:00 PM **Executive Roundtable**
This intimate and interactive format enables presenters and participants to candidly discuss topics ranging from the day's agenda to other critical business management issues.

5:30 PM **STAR Awards Cocktail Reception & Celebration**
Winners of the 2019 STAR Awards will be announced, recognizing the best marketing communications and innovation in the investment management industry.

