

ACCELERATED ACCLIMATION



OF THE INDUSTRY

- 8:00 AM** Registration & Continental Breakfast
- 8:30 AM** **Welcome**
Bradley Finkle, Chief Operating Officer | [Nuveen](#)
- Opening Remarks & Introductions**
Kimber Lintz, Director | [IMEA](#)
Bob Geppner, Executive Vice President, Head of National Sales-U.S. | [Franklin Templeton Investments](#)
 & Chair | [IMEA Executive Committee](#)
- 9:00 AM** **The Impact of the Ongoing Asset & Wealth Management Revolution**
 Change in the asset and wealth management industry continues to accelerate at an exponential rate. Asset managers are experiencing significant pressure on profitability due to continuing fee pressure; the “barbell” of passive combined with a focus on active, dedicated alpha sources; shrinking distribution platforms and the impact of new technologies. This session will provide PwC’s perspective on what asset managers must do to become business revolutionaries—even disruptors—if they are to survive and prosper.
John C. Siciliano, Senior Advisor | [PwC](#)
- 10:00 AM** Break
- 10:15 AM** **Model Portfolios on the Rise**
 One of the most prominent issues currently affecting the investment and wealth management industries is the increased use of model portfolios by advisors. This panel will provide perspectives from leading firms in this space regarding sales and marketing approaches, resources, technology, structure, and more.
Moderator: **Scott Brady**, Vice President, Head of US Product Development & Strategy | [Columbia Threadneedle Investments](#)
Brian Kmetz, Vice President & Associate Portfolio Manager | [Natixis Advisors](#)
Ryan O’Connor, Head of Model Portfolios | [Goldman Sachs Asset Management](#)
- 11:15 AM** **Financial Literacy: How to Engage**
 Experts say a large percentage of Americans fail to grasp basic financial concepts such as credit scores, interest rates and the importance of long-term planning leading to financial behavior that is far from successful. How do asset managers who want to be part of the solution address this critical issue? This session will highlight two successful programs in this area with different targets and approaches.
Jessica Fernandez, Head of WMI Segment Marketing | [Invesco US](#)
Tim Horsburgh, Senior Investment Strategist | [Invesco US](#)
Auyana Orr, Manager, Community Affairs & Ariel Education Initiative | [Ariel Investments](#)
- 12:15 PM** Lunch
- 1:00 PM** **Executive Roundtable**
 Open discussion lead by the IMEA Executive Committee.
- 2:30 PM** Adjourn