

DIGITAL & DATA INTERCHANGE

JUNE 11 • DENVER • HOSTED BY CHARLES SCHWAB

- 8:00 AM** Registration & Continental Breakfast
- 8:30 AM** **Opening Remarks & Introductions**
Kimber Lintz, Director — IMEA
Scott Burke, Chair — IMEA Digital Council & Digital Delivery Manager-Americas — Aberdeen Standard Investments
- 9:00 AM** **Digital, Tech, & Data Trends that are Modernizing the Asset Management Industry**
The asset management industry has always been slow and cautious with regards to change and modernization. But the next generation of investors and advisors have higher expectations and less patience for this. SS&C will present industry research covering related trends, ideas and predictions regarding best practices, technology adoption, client engagement in digital experience and more.
Mike Cogburn, Head of Digital Consulting and Innovation — SS&C Technologies
- 9:30 AM** **Leveraging Distribution Data for Marketing**
This session will provide perspectives of data partners, industry experts and investment managers to discuss what data your firm may not be tapping into that you should be; how to make the most out of the data you are utilizing; and, the most effective way to leverage that data in the digital channel.
Moderator: **Matt Schiffman**, Principal, Distribution Insight — Broadridge
Jane Conway, Managing Partner — ChangeArchitects
Deep Srivastav, Senior Vice President, Client Strategies & Analytics — Franklin Templeton Investments
Emily Puffett, Vice President, Head of North America Channel Marketing — Janus Henderson Investors
- 10:15 AM** Break
- 10:30 AM** **Digital Perspective — An Inside Out View**
Financial services digital and data strategists with roots in highly respected non-industry firms will share valuable B2B insights from their previous experience including lessons learned, challenges overcome and outside the box perspectives that have proven beneficial.
Moderator: **Jim Keenan**, Director, Digital Marketing — AMG
Neeraj Arora, Head of Insights & Analytics — Invesco
Karen Downard, Business Development Manager — ddm marketing & communications

DIGITAL & DATA INTERCHANGE

JUNE 11 • DENVER • HOSTED BY CHARLES SCHWAB

11:30 AM **The New Sales & Marketing Relationship**

The eco system of the sales and marketing community continues to evolve as more data becomes available and the expectation for personalized targeting and customer engagement increases. This session will feature members of data, digital, distribution and marketing teams sharing lead and engagement scoring strategies, processes, tools and programs.

Moderator: **Matt Chandler**, Digital Marketing Manager — Carillon Tower Advisers

Robi Krempus, Head of Analytics & Data Management — John Hancock Investment Management

Bill Rader, National Sales Manager, External Wealth Management & DCIO Sales — American Century Investments

Rich Smith, Chief Operating Officer, Global Distribution — American Century Investments

Jay Wightman, Head of Digital Experience, Wealth & Asset Management-U.S. & Europe — John Hancock Investment Management

12:30 PM Lunch & Networking

1:30 PM **Executive Roundtable**

This intimate, interactive format enables presenters and participants to candidly discuss topics ranging from the day's agenda to other critical issues.

3:00 PM Adjourn