

STRATEGIC MARKETING ROUNDTABLE

MARCH 5 | BOSTON | HOSTED BY COLUMBIA THREADNEEDLE INVESTMENTS

- 8:00 AM** | Registration & Continental Breakfast
- 8:30 AM** | **Welcoming Remarks & Introductions**
Chrystal Williams, Council Director — IMEA
Vicki Lester, Head of Intermediary Marketing — Columbia Threadneedle Investments & Chair — IMEA Marketing Council
- 9:00 AM** | **The Business Case for Marketing Innovation**
 A key challenge facing senior marketing executives today is how to effectively design a marketing organization for the future. This discussion will delve into the talent, skillsets and competencies required to be successful in the digital era, as well as provide insights on the state of marketing innovation in asset management.
Huard Smith, Vice President, Financial Services Practice Lead — Forrester
- 10:00 AM** | Networking & Break

Executive Roundtable Discussions

This intimate, interactive format will enable participants to candidly discuss their issues of interest and share experiences.

- 10:15 AM** | **Marketing Talent & Managing Teams: Roles, Training & Skillsets**
Moderator: John Davis, Director of Communications & Marketing — The Royce Funds
- 10:45 AM** | **Marketing Organizational Structures**
Moderator: Paul Zettl, Senior Vice President, Chief Marketing Officer — Cohen & Steers
- 11:15 AM** | **Current State of the Sales/Marketing Dynamic**
Moderator: Frank Wheeler, Global Head of Distribution — Matthews Asia
- 11:45 AM** | **Marketing as a Driver of Diversity & Inclusion**
Moderator: Vicki Lester, Head of Intermediary Marketing — Columbia Threadneedle Investments
- 12:15 PM** | Lunch & Networking
- 1:00 PM** | **Global Marketing Challenges**
Moderator: Jennifer Ball, Senior Vice President, Global Product & Client Marketing — Franklin Templeton Investments
- 1:30 PM** | **Optimizing Data — The Evolution of Sales & Marketing Analytics to Distribution Intelligence**
Moderator: Lauren Smith, Head of Integrated Marketing — T. Rowe Price
- 2:00 PM** | Open Discussion
- 3:00 PM** | Adjourn