Launching 9.16

The Future is Now | The Sprint to Innovation & Opportunity

Welcome & Opening Remarks

Marketing Council Sponsor SEISMIC

Kimber Lintz, Director | IMEA
Bill Finnegan, Managing Director, Financial Services Marketing | Seismic Software

Industry Overview

In addition to overall industry trends, Cerulli's recently released report, "U.S. Intermediary Distribution," includes focuses on obstacles and opportunities created by the pandemic. Cerulli will share insights on the impact of the current uncertainty on asset manager distribution and how marketing teams may better align with their sales teams moving forward.

Ed Louis, Senior Analyst, Wealth Management | Cerulli Associates

Advisor Needs: The Impact of the Pandemic

How has COVID-19 impacted advisor behavior, work habits, client servicing, etc.? Fidelity will share highlights of its recent Research Series on Advisor Engagement.

Don Burlone, Director, Strategic Research and Insights | Fidelity Investments
Jennifer Fantozzi, Vice President, Segment Marketing | Fidelity Investments

Embracing the New Digital Meeting

Having the skills to effectively engage virtually is a critical skillset in the digitally driven world. The ability to connect and communicate with audiences is a gamechanger. Hear about training programs, platforms and approaches investment industry firms are creating and adopting for their colleagues and clients.

Moderator: **Frank Wheeler,** Global Head of Distribution | Matthews Asia
Lisa Therese Kueng, Director of Creative Campaigns | Invesco
Anna van Ophem, Organizational Development/L&D Consultant | American Century Investments

The New Content Challenge

In response to the pandemic, Investment Management firms quickly pivoted towards more frequent, focused and personalized content delivered via multiple platforms. Based on client feedback there is no turning back. How do firms rethink their priorities and processes to meet new client expectations?

Moderator: **Meg Staknis,** Managing Director | Imprint
Vicki Lester, Head of Intermediary Marketing | Columbia Threadneedle Investments
Lauren Smith, Head of USI Integrated Marketing | T. Rowe Price

IMEA

Retirement Planning Shift

2020 has cast a different light on retirement planning. Many employers have suspended 401(k) contributions. Some individuals are having to retire sooner than planned. And, numerous Americans are reassessing their timeline and ability to provide adequate retirement income. How are these things shifting the overall needs of investors and client messaging on this critical issue?

Moderator: **Scot Hoffman,** Director of Communications | Dodge & Cox
Alyson Frost, Vice President, Retirement Insights Program Manager | J.P. Morgan Asset Management
Luke Vandermillen, Managing Director - Retirement Investment Support Team | Principal Global Investors

9.23

MARKETING ROUNDTABLE

LIVE | 2:00pm ET

Join your colleagues for a LIVE Roundtable hosted by the Marketing Council Steering Committee.

9.30

STAR CELEBRATION AND OVERALL HONORS

LIVE | 4:00pm ET

Recipients of the Overall Awards including will be presented during this LIVE celebration.

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Celebration Sponsor Broadridge