

Marketing Summit & STAR Awards Celebration

OCTOBER 17-18 | CHICAGO | HOSTED BY CALAMOS INVESTMENTS

AGENDA TUESDAY, OCTOBER 17

2:00 PM	Registration
2:30 PM	Welcoming & Opening Remarks Jessica Fernandez Senior Vice President, Chief Marketing Officer <i>Calamos Investments</i> Kimber Lintz Director <i>IMEA</i>
2:45 PM	Partner Perspective Seismic, Marketing Council Sponsor Kerry Ryan Director, Financial Services Industry Marketing <i>Seismic, Marketing Council Sponsor</i>
3:00 PM	AI's Role in Asset Management Marketing How are ChatGPT and other forms of generative artificial intelligence (AI) improving and disrupting how asset managers create, personalize, and distribute marketing content? What types of innovative ways are firms utilizing AI via digital channels? Hear first-hand about AI influenced content processes and learn about how TIAA's "digital human," Tia, is helping increase education and engagement. Moderator: Scott Wentworth Founder <i>Wentworth Communications</i> Gavin Daly Senior Vice President, Head of Corporate & Digital Marketing <i>Cohen & Steers</i> Tammy Namaste Zabawa Head Web <i>TIAA / Nuveen</i>
4:00 PM	AI Breakouts
4:30 PM	STAR Awards Reception
5:30 PM	STAR Awards Celebration & Awards Presentation
6:30 PM	Adjourn

STAR
AWARDS

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AGENDA WEDNESDAY, OCTOBER 18

8:00 AM	Registration & Continental Breakfast
8:30 AM	Opening Remarks Vicki Lester Vice President, Head of Segment Marketing, Consulting and Development <i>Columbia Threadneedle Investments, US & IMEA Marketing Council Chair</i>
8:45 AM	Market Overview Neil Bathon Founder & Partner <i>FUSE Research Network</i>
9:00 AM	The Art of a Successful Brand Refresh This session brings together a panel of marketing and branding experts who recently embarked upon an in-depth brand evaluation and refresh of a 40-year-old active investment firm. The process required a delicate balance between preserving brand essence and embracing the need for change and advancement. The team will discuss their experiences from conception to implementation and provide tangible insights to firms and marketers considering their own brand refresh. Moderator: Jessica Fernandez Senior Vice President, Chief Marketing Officer <i>Calamos Investments</i> John Hackett Chief Marketing Officer <i>Thornburg Investment Management</i> Claire Taylor Executive Vice President, Director of Creative Strategy <i>Carpenter Group</i>
9:45 AM	Elevating Education As our industry becomes even more complex, the need and demand for education across the value chain is growing. Whether the ask is from sales, advisors, or end investors, everyone wants to feel confident & knowledgeable when offering and/or considering certain products and programs. Moderator: Lauren Smith Head of Integrated Marketing <i>T. Rowe Price</i> Marcie Daniel Director, Practice Management <i>T. Rowe Price</i> Neil Keys Director, Product Marketing <i>T. Rowe Price</i> Allison Walters Global Client Skills Analyst <i>T. Rowe Price</i> Cindy Zarker Associate Director <i>ISS MI Market Intelligence</i>

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AGENDA WEDNESDAY, OCTOBER 18

10:45 AM

Break

11:00 AM

STAR Awards Highlights

Winners of some of this year's STAR Awards will share insights on their award-winning programs.

11:30 AM

Digital First...How's it Going?

Many firms throughout the industry have developed org structures, initiatives, relationships, tools and processes to tackle certain financial advisor segments through a low-cost digital first approach. Join this session to hear how two different firms are approaching this across marketing and sales. Let's discuss the challenges, philosophies, the successes and the failures.

Vicki Lester,

Vice President, Head of Segment Marketing, Consulting and Development | *Columbia Threadneedle Investments, US & IMEA Marketing Council Chair*

Victoria Fisher

Head of Internal Sales & Service, U.S. Wealth Advisory Services | *Nuveen*

Tara Giuliano

Chief Marketing Officer | *Nuveen*

Kersten Stannard

Vice President Head Digital Customer Experience, North America | *Columbia Threadneedle Investments*

12:30 PM

Box Lunch & Executive Roundtable

2:00 PM

Adjourn

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