

IMEANOVEMBER
1-2, 2023

BOSTON

Leadership Summit

HOSTED BY



MFS

AGENDA WEDNESDAY, NOVEMBER 1

2:00 PM

Registration

2:30 PM

Welcoming & Opening Remarks**Jim Adams**CIMA, Managing Director | *MFS Funds Distributor***Opening Remarks****Kimber Lintz**Executive Director | *IMEA***John McDonough** - Chair | *IMEA Executive Committee*Head of Americas Distribution | *Invesco*

3:00 PM

GenAI Transformative Impact on Asset Management

GenAI is an important breakthrough that makes the power of AI more accessible to all asset managers. In a recent study, BCG outlined five high impact uses of GenAI for Asset Managers which include efficiency gains, personalization, knowledge management, research assistants and technology development. In this session BCG will share the details of their findings and demonstrate live capabilities.

Chris McIntyreManaging Director & Partner, Head of Asset Management North America | *BCG***Barric Reed**Partner | *BCG*

4:00 PM

Break

4:15 PM

Talent Acquisition & Retention

Finding and retaining leaders and team members has never been so challenging. With more factors than ever impacting the considerations and decisions of hiring firms and applicants, how do you differentiate your firm and its culture? We'll hear from two industry executive search firms as well as an investment management firm talent acquisition leader on industry trends and successful hiring approaches.

Moderator | Jim CoveExecutive Vice President & Head of Marketing | *Natixis Investment Managers***Kathy Freeman**Founder & President | *Kathy Freeman Company***Kevin McKeon**Partner | *Ridgeway Partners***Melissa Werner**Senior Director, Talent Acquisition | *Columbia Threadneedle Investments*

5:00 PM

Networking Reception

6:30 PM

Adjourn

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AGENDA THURSDAY, NOVEMBER 2

8:00 AM Registration & Continental Breakfast

8:30 AM **Opening Remarks**
John McDonough - Chair | IMEA Executive Committee
Head of Americas Distribution | *Invesco*8:45 AM **Functional Trends & Strategic Priorities in Advisor-Sold Asset Management**
The shifting needs and growing expectations of individual investors continue to accelerate, transforming the roles asset managers play in supporting financial advisors and the way in which they partner with key intermediaries. Joint Broadridge/IMEA Survey responses will help illuminate and measure those strategic shifts that asset managers are making in their advisor-sold businesses through the lenses of distribution, data, marketing and product functions.
Ben Phillips
Head of Asset Management Global Advisory Services | *Broadridge Financial Solutions*
Ryan Foreman
Associate Principal, Advisory, Global Strategy Consulting | *Broadridge Financial Solutions*9:30 AM **Alternatives: Separating the Wheat from the Chaff in an Evolving Market**
Moderator | Dave Master
Jacob Walker
Managing Director & Chief Operating Officer, Client & Product Solutions | *Apollo Global Management*
Shane Clifford
Managing Director - Partner, Head of Private Wealth Strategy | *The Carlyle Group*

10:30 AM Break

10:45 AM **Brainstorming Solutions | Investment Management Best Practices**
SS&C will share research and perspective on top issues impacting investment management firms to set the stage for interactive, small group discussions with leaders in data, distribution, product and strategy. Learn how firms are approaching priorities to maximize across the board team engagement, hear challenges and successes firms have experienced, and identify best practices.
Lee Kowarski
Head of Distribution Solutions | *SS&C Technologies*
Matt Fronczke
Senior Director | *SS&C Research, Analytics & Consulting*

12:15 PM Break

12:30 PM **Box Lunch & Executive Roundtable**

2:00 PM Adjourn