

DATA SUMMIT

MARCH 19-20 | BOSTON

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AGENDA TUESDAY, MARCH 19

1:30 PM	Registration
2:00 PM	Welcome & Opening Remarks Kimber Lintz Executive Director <i>IMEA</i> Jamie Hedrick Vice President, Head of Global Distribution Intelligence <i>Franklin Templeton Investments</i>
2:30 PM	Current State of Data & Analytics in Asset Management Hear from some of IMEA's Data Council leaders on the current issues, challenges, opportunities and technologies asset management business intelligence and data professionals are experiencing. Ken Burd Director, Distribution Business Intelligence & Analytics <i>Principal Global Investors</i> Jim Keenan Director, Digital Marketing <i>AMG</i> Matt Machut Managing Director, Global Head of Sales Strategy & Enablement <i>Goldman Sachs Asset Management</i>
3:15 PM	Building a Team for Success How do you build a team to successfully engage with all stakeholders to maximize the value of data for all business areas? Hear how some firms have built their teams, why they were built that way, what's working and what isn't. Moderator Ken Burd Director, Distribution Business Intelligence & Analytics <i>Principal Global Investors</i> Graham Brewster Senior Vice President, Head of Distribution Operations & Enablement <i>Natixis Investment Managers</i> Kevin Crouch Vice President, Head of Data Science <i>Calamos Investments</i>
4:15 PM	IMEA / SS&C Joint Survey Results Hear analysis and insights from a survey co-developed by IMEA members and SS&C focused on business intelligence priorities as well as how asset managers are building robust sales enablement programs. Matt Fronczke Senior Director, Research, Analytics & Consulting <i>SS&C Technologies</i>
5:00 PM	Networking Reception

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AGENDA WEDNESDAY, MARCH 20

8:30 AM	Continental Breakfast
9:00 AM	Opening Remarks Jim Keenan Director, Digital Marketing <i>AMG & IMEA Data Council Chair</i>
9:15 AM	Modern Approaches to Segmentation This panel discussion will examine the evolution of advisor segmentation, including the data needed for segmentation, the sales and marketing implications of segmentation, and much more. Moderator Lee Kowarski Head of Distribution Solutions <i>SS&C Technologies</i> Amy Appicelli Managing Director, Head of US Wealth Client Marketing <i>Nuveen</i> Pedro Macedo Private Wealth Solutions - Business Development <i>Blackstone</i> Kristen Santerian Managing Director, COO & Head of Strategy, US Wealth Advisor Business <i>BlackRock</i> Vanessa Touma Head of Client Strategy & Digital Sales <i>Invesco</i>
10:15 AM	Break
10:30 AM	Evolution of Lead Generation This panel will share their knowledge and experience on various lead generation techniques and approaches, tools, and best practices. The panel will discuss how they collaborate with key stakeholders in data, marketing and sales to leverage digital marketing channels, client relationship systems and traditional wholesale resources and explore innovative approaches to attract, engage and convert potential leads most effectively. Moderator Michael Winnick President <i>AdvisorTarget</i> Bernadette Bridy Managing Director, Head of Marketing <i>FS Investments</i> Dalton Gustafson Senior Vice President, Head of Intermediary Investments & Sales <i>Fidelity Investments</i> Gabe Parras Director Sales & Marketing Intelligence <i>Thornburg Investment Management</i>
11:30 AM	Lunch & Networking
12:15 PM	Executive Roundtable Breakouts
2:00 PM	Adjourn

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