

DISTRIBUTION SUMMIT

APRIL 16-17 | PHILADELPHIA

HOSTED BY



FS INVESTMENTS®

AGENDA TUESDAY, APRIL 16

2:00 PM Registration

2:30 PM **Welcome & Opening Remarks**

Mike Reese

Chief Operating Officer, Distribution | *FS Investments*

Kimber Lintz

Executive Director | *IMEA*

2:45 PM **Opening Roundtable**

This open and interactive forum will allow members to candidly discuss distribution priorities, opportunities and challenges as well as specific issues facing their firms and receive direct feedback from colleagues.

Rocco Benedetto | *IMEA Distribution Council Co-Chair*

Head of Field Sales | *Invesco*

Jim Adams | *IMEA Distribution Council Co-Chair*

Managing Director, Global Strategic Accounts | *MFS Funds Distributor, Inc.*

Brian Carlson | *IMEA Distribution Council Steering Committee*

Senior Vice President & Head of Distribution | *Hennessy Funds*

Sean Mackley | *IMEA Distribution Council Steering Committee*

Head of B/D National Accounts and Centers of Influence | *T. Rowe Price*

Katie McKay | *IMEA Distribution Council Steering Committee*

Head of Global Retail Distribution Enablement | *John Hancock Investments*

4:00 PM Break

4:15 PM **How Are Firms Building Robust Sales Enablement Programs?**

Hear analysis and insights from a survey co-developed by IMEA leaders and SS&C focused on how distribution, marketing, and sales teams can work together to identify strategies and leverage data for successful outcomes.

Jeff Strange

Principal, Strategic Business Consulting | *SS&C Technologies*

5:00 PM **Networking Reception**

IMEA

DISTRIBUTION
COUNCIL
SPONSOR

SS&C

DISTRIBUTION SUMMIT

APRIL 16-17 | PHILADELPHIA

HOSTED BY



FS INVESTMENTS®

AGENDA WEDNESDAY, APRIL 17

8:00 AM	Continental Breakfast
8:30 AM	Opening Remarks Rocco Benedetto Head of Field Sales <i>Invesco & IMEA Distribution Council Co-Chair</i>
8:45 AM	Winning with Advisor Data Executing an effective strategy for advisor data requires firms to ask tough questions. Who owns the data? How much should be spent on it? Can the results be measured? Learn how some investment managers have built teams, processes and approaches to maximize data optimization. Moderator Craig Kilgallen Director of Relationship Development <i>FUSE Research Network</i> Colin Prescott Managing Director - Business Development <i>Diamond Hill</i> Tracy Roediger Distribution Strategy & Innovation Lead <i>Macquarie Asset Management</i>
9:45 AM	Break
10:00 AM	The Data Journey One of the key challenges of BI/data/analytics leadership is getting insights into the hands of decision makers—distribution, sales and marketing—in a way that they will be likely to use. This discussion will take us through the data journey from raw data to insight delivery with perspectives from both a data deliverer and deliveree. Moderator Tim Kresl Principal of Distribution Insight <i>Broadridge</i> Rocco Benedetto Head of Field Sales <i>Invesco</i> Vanessa Touma Head of CX Strategy, Distribution Intelligence and Digital Sales <i>Invesco</i>
11:00 AM	Turning Insights into Action Once you have the “right” data and have effectively delivered it to your distribution and marketing teams, how do you work together to identify and execute a successful strategy? Hear first-hand from industry leaders on successes, challenges and lessons learned and how their insights can help assess and improve your firm’s sales enablement strategies. Moderator Lee Kowarski Head of Distribution Solutions <i>SS&C Technologies</i> Matt Eisenhardt Head of Wealth Management Field Sales <i>Capital Group</i> David Kim Head of Marketing Intelligence & Operations <i>Vanguard</i> Cheryl Pipia Head of Global Sales Management <i>T. Rowe Price</i>
12:00 PM	Break
12:30 PM	Brainstorming Breakouts & Box Lunch Attendees will break into small groups for candid, interactive conversations on potential ways to address industry challenges and pain points as well as capitalize on opportunities.
2:00 PM	Adjourn

IMEA

DISTRIBUTION
COUNCIL
SPONSOR

SS&C