

PRODUCT SUMMIT


MAY 1-2 | PHILADELPHIA

IMEA

AGENDA WEDNESDAY, MAY 1

2:30 PM	Registration
3:00 PM	Welcome & Opening Remarks Jim Hinkley Managing Director <i>Macquarie Asset Management</i> Kimber Lintz Executive Director <i>IMEA</i>
3:15 PM	Executive Engagement Roundtable This interactive forum provides the opportunity for maximum engagement where attendees can candidly discuss product management and development priorities, opportunities and challenges. Direct questions can also be posed to your colleagues so you can receive direct feedback on specific issues facing your firm. Discussion Leaders: Michael Twohig <i>IMEA Product Council Chair</i> Head of U.S. Public Product Development <i>Goldman Sachs Asset Management</i> Jim Hinkley Managing Director <i>Macquarie Asset Management</i> Ed Nini Managing Director, Global Head of Product <i>Principal Asset Management</i>
4:15 PM	Managing Global Product Strategies & Teams This panel will explore how global firms maximize capabilities by optimizing global leverage and local knowledge in the organization and structure of product teams. Providing insights from those in the global space and firms considering entering it, discussion topics will include: <ul style="list-style-type: none">• How do you build standardization while maintaining regional autonomy and client preferences?• How do you balance resourcing growth in regions outside US given the lower assets/revenue pool than the US?• How do you source talent with skills and expertise to span global roles? Moderator Jim Hinkley Managing Director <i>Macquarie Group</i> Ann Doyle Head of U.S. Product <i>Franklin Templeton Investments</i> Erik Gosule, CFA Director, Product & Marketing Management Division, Senior Vice President <i>Federated Hermes</i>
5:00 PM	Networking Reception Sponsored by 

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AGENDA THURSDAY, MAY 2

9:00 AM	Continental Breakfast
9:30 AM	Opening Remarks Michael Twohig <i>IMEA Product Council Chair</i> Head of U.S. Public Product Development <i>Goldman Sachs Asset Management</i>
9:45 AM	FUSE Perspective on the Product Landscape Neil Bathon, Managing Partner of FUSE Research Network will share research and candid perspectives on the top issues facing product leaders. This fast-paced review will cover topics such as improving new fund success rates, ETF transition options, growth of competing structures, pricing philosophy and product rationalization. Neil Bathon Founder & Partner <i>FUSE Research Network</i>
10:30 AM	Break
10:45 AM	The Retirement Market Outlook Growing demand, increasingly supportive legislation and the continued evolution of products and personalized experiences are shaping the retirement landscape. Hear from two leading retirement firms on: <ul style="list-style-type: none">• Transition of Mutual Funds to CITs• Target Date Funds• ETFs & The Retirement Space Moderator Ed Nini Managing Director, Global Head of Product <i>Principal Asset Management</i> Jennifer Debrosky Senior Director, Product Manager Multi-Asset Strategies <i>American Century Investors</i> John Faustino Head of Retirement Products <i>Broadridge</i> Kimberly Zook Head of Retirement, US Intermediaries <i>T. Rowe Price</i>
11:45 AM	Active ETF Product Innovation This discussion will explore active ETF opportunities including: <ul style="list-style-type: none">• "Levels of Activation" on the active / passive spectrum• Transparent vs. Semi-Transparent / Non-transparent• Pricing Strategies• Strategy Suitability - What does it take to win? Alan Hess Vice President <i>ISS Market Intelligence Research</i>
12:30 PM	Break
12:45 PM	Brainstorming Breakouts & Box Lunch Attendees will break into small groups for candid, interactive conversations to provide perspectives on potential ways to address industry challenges and problem solve pain points.
2:00 PM	Adjourn

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