DISTRIBUTION SUMMIT

AGENDA | TUESDAY, APRIL 8

8:30 AM — **Registration**

9:00 AM — **Welcome**
Kimber Lintz | Executive Director | *IMEA*
Katie McKay | Head of Global Distribution Enablement | *John Hancock Investment Management*

9:15 AM — **Opening Remarks & Introductions**
Jim Adams, CIMA | Managing Director, Global Strategic Accounts | *MFS Investment Management*
IMEA Distribution Council Steering Committee Chair

9:45 AM — **SS&C Perspective - Issues and Trends**
SS&C will share insights on the latest distribution trends, explore meaningful engagement opportunities with financial advisors, and present their latest research to help shape strategies.
Matt Fronczke | Senior Director, Strategic Business Consulting | *SS&C Technologies*

10:15 AM — **The Evolving RIA Space**
Distinct segments have emerged within the RIA marketplace with each having different requirements for success for investment firms. This session will provide actionable insights on the diverse needs of each segment, ensuring your tactics are relevant and effective. The panelists will share insights that will help to effectively align resources, refine coverage models and prioritize support resources to match the needs of both the platform teams and individual advisors alike.
Moderator
Neil Bathon | Managing Partner | *FUSE Research Network*
Panelists
Meghan Moses | Managing Director, RIA & Family Office Distribution | *Eaton Vance*
Chris Hedges | Managing Director | *MFS Investment Management*
Dustin McCarty | Partner & Director, Global Head of Client & Distribution | *Wasatch Global Investors*

11:15 AM — **Keys to Success with Advisors**
This session will provide essential strategies for engaging with and supporting the diverse range of advisors in today's evolving landscape. Attendees will gain insights into effective methods for reaching different types of advisors through digital channels, and in-person meetings as well as best practices for leveraging digital tools and outreach to connect, communicate, and collaborate with advisors remotely. Additionally, we'll explore how to secure meaningful face-to-face meetings, determine the ideal frequency of outreach, and maintain strong, lasting relationships in a post-pandemic world.
Moderator
Michael Winnick | Vice President, Business Development | *Broadridge*
Panelists
Mike Ellison | President | *Corporate Insight*
Katie McKay | Head of Global Distribution Enablement | *John Hancock Investment Management*
Jenine Garrelick | Senior Vice President | *MFS Investment Management*

12:00 PM — **Box Lunch & Distribution Council Roundtable**

IMEA

EVENT HOST — John Hancock

DISTRIBUTION COUNCIL PARTNER — SS&C

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1:30 PM — **Navigating the Ultra-High Net Worth RIA Journey**

This session will examine the unique needs of the high-net-worth RIA segment including essential processes and procedures that investment managers can implement to navigate this space effectively. Key challenges faced by investment managers will also be addressed, along with strategies for overcoming these obstacles. Additionally, the session will explore how high net worth RIAs seek to collaborate with investment managers, and how to foster strong partnerships that drive growth in this critical business area.

Moderator

Matt Fronczke | Senior Director, Strategic Business Consulting | *SS&C Technologies*

Panelists

George Whitmore | Head of Business Development & Client Relations | *Anchor Capital*
Rick Henn | Senior Vice President & Divisional Sales Director | *Invesco*
Robert Trumbull | Vice President & Wealth Advisor | *J.P. Morgan*

2:15 PM — **Break**

DISTRIBUTION & PRODUCT COUNCIL JOINT SESSIONS

2:30 PM — **The Rise of the Model Marketplace**

As the model marketplace continues to evolve, what opportunities are being created for investment managers to help firms grow and scale their businesses. And, how do firms identify the right advisors for their offerings? This discussion will address issues surrounding OCIO, TAMPs and Models as well as identify investment trends and usage penetration in the models space.

Moderator

Ryan Foreman | Associate Principal, Data & Analytics | *Broadridge*

Panelists

Paolo Villasenor | Head of Product Development, North America & Global Pricing | *Janus Henderson Investors*
Brian Hess | Vice President, Multi-Asset Investment Strategist | *Natixis Investment Managers*
Alex Ohlemacher | Associate Director, Portfolio Consulting | *Principal Asset Management*
Kevin Knowles | Senior Director, Personalized Solutions | *Russell Investments*

3:30 PM — **Everything ETF**

Lots of conversations currently include the three letters ETF. This discussion will touch on many of them including the implications of ETF Conversions and share classes, distribution considerations, active and passive ETF products and more.

Moderator

Mike Twohig | Head of U.S. Public Product Development | *Goldman Sachs Asset Management*

Panelists

Ann Doyle | Head of U.S. Product | *Franklin Templeton Investments*
John Garrett | Senior Managing Director, Co-Head of Defined Contributions, Head of U.S. Strategic Accounts | *MFS Investment Management*
Tom Bruno | Director of Market Strategy | *SalesPage*
Julie Smith | Vice President, Fund Administration & Operations | *Touchstone Investments*

5:00 PM — **Networking Reception | Sponsored by Broadridge**

IMCA

EVENT HOST: John Hancock

DISTRIBUTION COUNCIL PARTNER: SS&C

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