IMEA Leadership Planning Meeting

FEBRUARY 5
BOSTON

8:30 AM — **Continental Breakfast**

9:00 AM — **IMEA State of the State**
Jim Cove | IMEA Chair & Executive Vice President, U.S. Marketing | *Natixis Investment Managers*
Neil Bathon | Founder & Partner | *FUSE Research Network*
Kimber Lintz | Executive Director | *IMEA*
- Engagement Goals (Attendance, Recruitment, etc.)
- Membership Development
- Sponsorship Plans
- Event Schedule
- Mission Refinement

9:45 AM — **Executive Council Goals & Priorities**
- **Ken Burd** | Co-Chair IMEA Distribution Intelligence Council | *Principal Asset Management*
- **Jim Adams** | Chair IMEA Distribution Council | *MFS Investment Management*
- **Bill Jacobs** | Co-Chair IMEA Internal Sales Desk Council | *Franklin Templeton Investments*
- **Vicki Lester** | Chair IMEA Marketing Council | *Columbia Threadneedle Investments*
- **Sean Mackley** | Chair IMEA National Accounts Council | *T. Rowe Price*
- **Mike Twohig** | Chair IMEA Product Council | *Goldman Sachs Asset Management*

10:45 AM — **Break**

11:00 AM — **2025 Strategy & Initiatives Discussions**
Discussion Leaders | IMEA Executive Committee
- **Jim Cove** | *Natixis Investment Managers*
- **Jill Brown** | *Principal Asset Management*
- **Annie Brown** | *T. Rowe Price*
- **Rocco Benedetto** | *Invesco*
- **Alex Gardner** | *Diamond Hill*

New Executive Councils
Discussion Leader: **Jim Cove** | *Natixis Investment Managers*
- Business Management (i.e., COOs of Distribution)
- National Sales Manager
- Institutional Business Development
- Others (i.e., due diligence, specialists)

11:45 AM — **Break**

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12:00 PM — **Box Lunch**

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Discussion Leader: **Annie Brown** | *T. Rowe Price*
- Approach
- Supporting Initiatives

12:30 PM — **Education Program**
Discussion Leader: **Kimber Lintz** | *IMEA*
- IMEA Onboarding Education Initiative
- Education / Certification Programs

1:15 PM — **STAR Awards**
Discussion Leader: **Jim Cove** | *Natixis Investment Managers*
- Focus / Direction
- Awards Categories
- Partnership Opportunities
- Rising Stars & Mentorship Program

2:00 PM — **New Topic-Driven Roundtables**
Discussion Leaders: **Rocco Benedetto** | *Invesco* - **Alex Gardner** | *Diamond Hill*
- Active ETFs
- Content Management
- Human Resources
- Compliance
- Other

2:30 PM — **Charitable Giving**
Discussion Leader: **Jill Brown** | *Principal Asset Management*
- Charity Selection Process
- Donation Amount Determination

3:00 PM — **Adjourn**

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