



LEADERSHIP SUMMIT

AGENDA | WEDNESDAY, OCTOBER 23

8:00 AM

Continental Breakfast

8:30 AM

Welcome

Kimber Lintz

Executive Director | *IMEA*

Opening Remarks & Introductions

John McDonough | *IMEA Executive Committee Chair*

Head of Americas Distribution | *Invesco*

9:15 AM

From Product to Service

As client needs change dramatically, asset managers are exploring new ways to position, deliver and monetize their capabilities that extend beyond the traditional economics of packaged products. Ben will provide his perspective on how firms should think about developing their service strategy and share highlights from Oliver Wyman's recent thought leadership piece.

Ben Phillips

Partner | *Oliver Wyman*

10:00 AM

Break

10:15 AM

Unlocking AI's Potential for Investment Management

This panel will address deployment approaches, use cases, and challenges related to leveraging AI in investment management. Discussion topics include:

- Taking a Step Back - what is the state of AI's use in the industry today and how is it being used?
- Ways of Deploying AI - different approaches to technology, delivery & organizational structure
- Measuring Value - how should we be measuring the results of leveraging AI in investment management?

Moderator: Will Karkar

Executive Director & North America Management Committee Member | *Alpha FMC*

Sam Iles

Senior Partner, Ventures & Innovation - Marketing, Brand & Creative Services | *Alpha FMC*

Tod McKenna

Global Head of Data Science and AI | *Citi Securities Services*

Vanessa Touma

Head of CX Strategy, Distribution Intelligence and Digital Sales | *Invesco*

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11:15 AM

The Rise of Active ETFs

ETFs are no longer only a passive game. Active ETFs have gained significant traction in recent years and now serve as a viable vehicle for many active managers to expand their investment capabilities. Hear lessons learned from established and newer Active ETF players as they've migrated from product development to commercialization. The valuable considerations you'll take away from this session will help your firm assess the practicality of Active ETFs in your product offering.

Moderator: Ed Nini | Managing Director, Global Head of Product | *Principal Asset Management*

Jay Jacobs | U.S. Head of Thematic & Active ETFs | *BlackRock*

Dan Schreiberstein | Head of Growth Marketing | *Capital Group*

Danielle Rutsky | ETF Lead Product Manager | *Nasdaq*

12:15 PM

Lunch

12:45 PM

Business Area Brainstorming Breakouts | Challenges, Priorities and Best Practices

Participants will break into small discussion groups in four primary business areas to discuss top priorities and challenges they anticipate in 2025. Leaders in Data, Distribution, Marketing & Product will also share 2024 "wins" and identify best practices.

2:00 PM

IMEA Update

What's IMEA been up to this year? IMEA Leaders will share 2024 highlights, Executive Council updates and ask for insights from members on initiatives for 2025.

2:45 PM

Executive Roundtable

This intimate and interactive format enables participants to pose specific questions to their colleagues and candidly discuss topics ranging from the day's agenda to other critical business management issues.

3:30 PM

Leadership Summit Adjourns

4:00 PM

STAR Awards Cocktail Reception | *Sponsored by Synthesis Technologies*

5:00 PM

STAR Awards Celebration & Awards Presentation

 | *Hosted by Corporate Insights*

For nearly 30 years, the IMEA STAR Awards has recognized investment management excellence in marketing, communications, education, innovation, collaboration and community impact. Recipients of this year's Awards, including first-time winners of new 2024 categories, will be announced by IMEA Executive Director, Kimber Lintz and Andy Seibert, Founder and CEO of decades long sponsor of the STAR Awards Program, Imprint.

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