

**IMEA**NOVEMBER  
1-2, 2023

BOSTON

# Leadership Summit

HOSTED BY



MFS

## AGENDA WEDNESDAY, NOVEMBER 1

2:00 PM

Registration

2:30 PM

**Welcome****Jim Adams**Managing Director, Global Strategic Accounts | *MFS Investment Management***Opening Remarks****Kimber Lintz**Executive Director | *IMEA***John McDonough** - Chair | *IMEA Executive Committee*Head of Americas Distribution | *Invesco*

3:00 PM

**GenAI Transformative Impact on Asset Management**

GenAI is an important breakthrough that makes the power of AI more accessible to all asset managers. In a recent study, BCG outlined five high impact uses of GenAI for Asset Managers which include efficiency gains, personalization, knowledge management, research assistants and technology development. In this session BCG will share the details of their findings and demonstrate live capabilities.

**Philip Bianchi**Partner | *BCG***Barric Reed**Partner | *BCG*

4:00 PM

Break

4:15 PM

**Talent Acquisition & Retention**

Finding and retaining leaders and team members has never been so challenging. With more factors than ever impacting the considerations and decisions of hiring firms and applicants, how do you differentiate your firm and its culture? We'll hear from two industry executive search firms as well as an investment management firm talent acquisition leader on industry trends and successful hiring approaches.

**Moderator | Jim Cove**Executive Vice President and Head of U.S. Marketing | *Natixis Investment Managers***Kathy Freeman**Founder and President | *Kathy Freeman Company***Hari Krishnaswami**Managing Director | *Ridgeway Partners***Paige Skilling**Vice President, Human Resources | *Natixis Investment Managers*

5:00 PM

**Networking Reception**

6:30 PM

Adjourn

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## AGENDA THURSDAY, NOVEMBER 2

8:00 AM

Registration &amp; Continental Breakfast

8:30 AM

**Opening Remarks****John McDonough** - Chair | IMEA Executive Committee  
Head of Americas Distribution | *Invesco*

8:45 AM

**Strategic Imperatives in U.S. Advisor-Sold Asset Management**

The shifting needs and growing expectations of individual investors continue to accelerate, transforming the roles asset managers play in supporting financial advisors and the way in which they partner with increasingly heterogenous intermediaries. Asset managers are looking to data both to define their competitive advantages, and to develop strategic initiatives that deploy them in a way that optimizes the firm's limited resources. Utilizing our joint Broadridge/IMEA Survey responses we'll explore the strategic imperatives facing asset managers, and measure the function-specific impacts across distribution, marketing and product.

**Davis Walmsley**Global Financial Services Executive | *Broadridge Financial Solutions*

9:30 AM

**Alternatives: Separating the Wheat from the Chaff in an Evolving Market**

Alternatives continue to receive significant attention in the industry. Many large, primarily long-only equity and fixed-income managers already have or are looking to diversify into this space. This discussion will focus on the intermediary market with the intent to "step back" and take a fresh look at a range of topics from an investor and distributor perspective.

**Moderator | Dave Master**

IMEA Executive Committee

**Jacob Walker**Managing Director and Chief Operating Officer, Client & Product Solutions | *Apollo Global Management***Mark Robillard, CFA®, CAIA®, FRM®**Vice President, Alternative Investments Research Analyst | *Fidelity Investments***Shane Clifford**Managing Director - Partner, Head of Private Wealth Strategy | *The Carlyle Group*

10:30 AM

Break

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## AGENDA THURSDAY, NOVEMBER 2

10:45 AM

### **Brainstorming Solutions | Investment Management Best Practices**

SS&C will share research and perspective on top issues impacting investment management firms to set the stage for interactive, small group discussions with leaders in data, distribution, product and strategy. Learn how firms are approaching priorities to maximize across the board team engagement, hear challenges and successes firms have experienced, and identify best practices.

**Lee Kowarski**

Head of Distribution Solutions | SS&C

**Matt Fronczke**

Senior Director | SS&C

12:15 PM

Break

12:30 PM

### **Box Lunch & Executive Roundtable**

2:00 PM

Adjourn