

IMEA

SS&C

Agenda

Product Council Summit

April 26 | New York | Hosted by  Invesco

Wednesday, April 26th

9:00 am Registration & Continental Breakfast

9:30 am Welcome & Opening Remarks

John McDonough, Head of Americas Distribution | Invesco Distributors & IMEA Executive Committee Chair
Dan Beckman, Head of U.S. Product | Columbia Threadneedle Investments & IMEA Product Council Chair
Kimber Lintz, Director, IMEA

10:00 am **Hot Product Strategies**

The proliferation of products is causing firms to evaluate their current focus and potential opportunities. ISS MI will share research and insights on product trends and managers in various spaces will share perspectives to help firms determine strategies to expand their product offerings.

Moderator: Jim Hinkley, Managing Director | Macquarie Asset Management
Adam Feldstein, Associate Director, Product Engagement Specialist | ISS MI
Sandra Testani, Vice President, ETF Product & Strategy | American Century Investments
Diane Vallerie Improta, Senior Director, Retirement & Consultant Relations | SEI
Ann Doyle, Head of U.S. Product | Franklin Templeton

11:00 am Break

11:15 am **ETFs Everywhere**

With so many different types of ETF products out there — active to passive, transparent to non-transparent, and thematic, to name a few — how do firms know which, if any, make sense for them? Do you start from scratch or consider fund conversions? How do you secure critical shelf space? This discussion will explore ETF challenges and opportunities.

Moderator: Ed Nini, Managing Director, Global Head of Product | Principal Global Investors
Michael Curtis, Executive Director, ETF Product Team | J.P. Morgan Funds
Todd Rosenbluth, Head of Research | VettaFi

12:15 pm Lunch

1:00 pm **The Continuing Evolution of Alternative Investing**

Alternative investments are becoming more attractive to advisors and investors. How can the ever important and challenging client experience be improved? What do firms need to do to get their alternative strategies on more platforms? This interactive discussion will address these issues and more in the evolving alternatives space.

Moderator: Greg Freer, Head of Investment Solutions, Fixed Income | Invesco
Vivian Sze, Director, Global Product Innovation | Apollo Global Management
Jane Conway, Managing Director, Head of Digital, Data & Enablement—Client & Product Solutions | Apollo Global Management
Pat McManus, Principal | Apollo Global Management

Colin Oberg, Senior Director and Head of North America Product Real Management | Invesco Real Estate
Brian Holzer, Head of Distribution for Alternative Investments | Morgan Stanley

2:00 PM

Pending Regulation & Implementation

An update on pending product regulatory issues including the definition of Benchmark, the names rule, ESG and more.

Taylor Edwards, Assistant General Counsel | Invesco

Sean Ryan, Assistant General Counsel | Invesco

2:45 pm

Break

3:00 pm

Product Council Roundtable

3:45 pm

Break

4:00 pm

PRODUCT & DISTRIBUTION COUNCILS – Joint Session

Distribution & Product Partnership in Innovation & Managing the Product Lifecycle

This session will bring distribution and product leaders together to candidly discuss how their teams can work closely to provide innovative product offerings and successful client experiences.

Moderator: **Dan Beckman**, Head of U.S. Product | Columbia Threadneedle Investments & IMEA Product Council Chair

Panelists: **Roger Michaud**, Senior Vice President, Divisional Sales Manager | Franklin Templeton Investments

Ben Phillips, Head of Asset Management Global Advisory Services | Broadridge, Advisory

Ryan Foreman, Associate Principal, Asset Management Advisory | Broadridge, Advisory

Dennis Gallant, Associate Director | ISS MI

5:00 pm

Reception