

PRODUCT SUMMIT

AGENDA | TUESDAY, APRIL 8

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

AGENDA | WEDNESDAY, APRIL 9

8:30 AM

Continental Breakfast & Registration

9:00 AM

Welcome

Kimber Lintz | Executive Director | *IMEA*

Mike Ellison | President | *Corporate Insight, Product Council Partner*

9:15 AM

Opening Remarks & Introductions

Mike Twohig | Head of U.S. Public Product Development | *Goldman Sachs Asset Management*
IMEA Product Council Steering Committee Chair



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9:45 AM

2025 Regulatory Outlook: Navigating the Future of Investment Products

This session will explore regulatory trends and developments that will impact the investment product landscape in the coming year. The discussion will cover a broad range of emerging and evolving investment products including:

- ETF Share Classes: Learn about the latest regulatory shifts impacting the structure, distribution, and management of exchange-traded funds (ETFs).
- Next-Generation ETFs: Discover upcoming trends in ETF innovation, including thematic, actively managed, and multi-asset strategies.
- Interval Funds: Gain insights into the growing role of interval funds and their regulatory challenges.
- Cryptocurrency: Delve into the evolving regulatory landscape surrounding cryptocurrencies.

Moderator Ben Stewart CAIA, CIMA | Head of Business Strategy & Development, Equities | *Invesco*

Panelists

Devin McCune | Vice President Board Solutions | *Broadridge*

Mike Mundt | Partner | *Stradley Ronon*

10:30 AM

The Private Asset Marketplace in the Intermediary / Retail Space

This session will delve into the significant growth and evolution within the private asset marketplace. Traditionally, these asset classes have been exclusive to institutional investors and high-net-worth individuals but the landscape is changing. With a growing demand for alternative investments, traditional asset managers are not only building internal capabilities but also forming strategic partnerships and acquiring firms with expertise in these areas. We will explore the different innovative wrappers being used to democratize access to these asset classes, offering greater opportunities to a wider range of investors. Join us as we examine these trends and what they mean for the future of investing in alternative assets.

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

Panelists

Neal Heble | Managing Director & Head of Product Structuring & Governance | *FS Investments*

Kyle Kniffen | Managing Director, Global Head of Alternatives, Third Party Wealth | *Goldman Sachs Asset Management*

Dominick Carlino | Global Head of Alternative Investments | *PGIM Investments*

11:15 AM

Break

11:30 AM

Strategic Partnerships - How New Industry Alliances are Altering the Asset Management Competitive Landscape

Strategic partnerships have grown in response to secular changes to investor preferences and regulation. Traditional asset managers have sought competitive efficiencies through alliances with alternative and private wealth firms to combat margin pressures and accelerated outflows, while partnering firms have looked to gain greater distribution access to wealth segments. Hear how firms on both sides of these arrangements are approaching partnership opportunities.

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

Panelists

Jake Walker | Partner & Chief Operating Officer Client and Product Solutions | *Apollo Global Management*

Anna Narem | Director of Product Management & Analytics | *Calamos Investments*

Shweta Narasimhadevara | Global Head of Private Markets and Alternatives | *State Street Global Advisors*

12:15 PM

Box Lunch & Executive Roundtable

1:30 PM

Adjourn



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