

OCTOBER 28 | *NEW YORK*

LEADERSHIP SUMMIT

1:00 PM	**Registration**
1:30 PM	**Welcome & Opening Remarks** **Kimber Lintz** | Executive Director | *IMEA* **Jim Cove** | Executive Vice President, Head of U.S. Marketing | *Natixis Investment Managers* *Chair | IMEA Executive Committee*
1:45 PM	**Participant Introductions**
2:15 PM	**Sum of the Parts: The Growing Opportunities for Asset Managers in Partnerships, Alliances and M&A** Investor demands become more complex and customized without any relief from relentless fee pressure and competition from elsewhere in the advice ecosystem. Consequently, asset managers are realizing their long-term success requires access to a wider range of capabilities – not just spanning investments and distribution, but also involving access, permanent capital, origination, advice and technology. Oliver Wyman will share new research that examines: • The state of the asset management industry • How changing demands are reshaping the industry's traditional scalable operating model • The growing role of creative partnerships and alliances to meet investor needs • The proliferation of M&A discussions – and what makes transactions work or fail **Ben Phillips** | Partner | *Oliver Wyman*
3:00 PM	**Executive Roundtable** An interactive discussion for attendees to further examine points raised by Ben Phillips and candidly discuss additional topics of interest with colleagues. ***Facilitators*** **IMEA Executive Committee** **Ben Phillips** | Partner | *Oliver Wyman*
3:45 PM	**IMEA Update**
4:30 PM	**Philanthropic Day** IMEA Members will provide hands on support to Ronald McDonald House Charities by assembling NICU bags. These essential grab-and-go bags provided crucial support ensuring families have what they need during difficult times.
5:30 PM	**Reception**

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8:30 AM **Continental Breakfast**

9:00 AM **Opening Remarks**
Kimber Lintz | Executive Director | *IMEA*
Rocco Benedetto | IMEA Executive Committee Member | Head of Field Sales, US Wealth Management Intermediaries | *Invesco*

9:15 AM **Mastering Client Experience at Scale**
The wholesale and retail spaces are becoming ever more competitive; what are the implications of this continued growth for investment managers? Differentiation is crucial and the way content is being searched for, accessed & surfaced is changing. Investment managers need scalable technology in order to create personalization and seamless client experiences. We'll discuss the implications across three main pillars: sales, marketing & client servicing. Challenges such as brand, headless technology, automation, account-based marketing, evolving vendor partnerships and the role of AI; where should the commitment, investment, ownership and accountability for building robust distribution platforms sit? How can we ultimately deepen client relationships, grow our customer base and generate more revenue?
Benjie Elston | Partner, Asset & Wealth Management | *Alpha FMC*

9:45 AM **AI Breakout Sessions**
Attendees will break into small groups for candid conversations on AI, how it's being implemented and the impact it's having—and will have—on the investment management industry. IMEA Partners including Broadridge, FUSE, Seismic and SS&C will provide research and perspectives as well as facilitate the discussions.
Facilitators
Ryan Foreman | Associate Principal, US Distribution Solutions | *Broadridge*
Samantha Fritsch | Research Manager | *Corporate Insight*
Mario Favetta | Relationship Manager | *FUSE Research Network*
Bob Murphy | Vice President - Financial Services & Solutions | *Seismic*
Jeff Strange | Strategic Business Consultant for WalletShare | *SS&C Technologies*

11:00 AM **Break**

11:15 AM **Box Lunch & Interactive Session**

Interactive Winning as a Team of Teams: A Proven Model for Leadership in Asset Management
Investor, asset and wealth managers face unrelenting pressure: rapid industry evolution, heightened competition, and the commoditization of legacy products. In this environment, the competitive edge entirely within your control is leadership and teamwork. How leaders create the conditions for coordinated execution, trust, and adaptability across silos ultimately determines whether firms can deliver unified client solutions and stay ahead of change.

This interactive session will introduce the Team of Teams model first developed by General Stan McChrystal and now leveraged by leading firms in wealth and asset management. The model emphasizes the fundamental role of leaders today: establishing common purpose and trust across teams and business lines, building shared consciousness through better information flow and context, and enabling empowered execution by cross-functional teams closer to the client. Participants will discuss how these principles apply directly to their challenges and leave with practical insights and tangible actions to take back to their organizations.
Ryan Flynn | Partner | *McChrystal Group*

1:00 PM **Adjourn**

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