NATIONAL ACCOUNTS SUMMIT



MAY 20 | NEW YORK

8:00 AM — **Continental Breakfast**

8:30 AM — **Welcoming Remarks & Introductions**
Kimber Lintz | Executive Director | *IMEA*
Sean Mackley | Head of Broker / Dealer National Accounts & Centers of Influence | *T. Rowe Price*
National Accounts Council Chair | *IMEA*
Diane Marzula | Manager of Global Accounts | *Federated Hermes*

8:45 AM — **Summit Sponsor Perspective: The ETF Surge is Real—But Are You Seeing the Full Picture?**
Explosive ETF growth has exposed the cracks in outdated distribution systems. We'll show how firms can overcome data gaps, sharpen their advisor targeting, and create more effective partnerships in today's fast-moving market.
Jeff Mehi | Head of Wealth Partnerships | *TIFIN AMP*

9:15 AM — **Back to the Future: Key Trends in US Retail**
"I guess you guys aren't ready for that yet. But your kids are gonna love it."
In this session we'll explore all the most important trends we've been discussing for the past decade, but we're finally seeing take hold as the next generation of platforms and advisors pushes us into a familiar looking future. We'll explore the following topic areas, with a focus on each trend's relevance to retail distribution and national accounts specifically.

- Changes in investor confidence in light of recent market volatility
- Product landscape and allocation trends with a focus on
    - Active ETF trajectory and best practices
    - SMA & alternative trends
- Distribution ecosystem updates
    - Shifting advisor needs
    - Advisor teaming trends
    - Prospecting best practices

Tim Kresl | Managing Principal, Head of U.S. Client Success | *Broadridge*

10:15 AM — **Break**

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10:30 AM — **Products & Vehicles**
This discussion will highlight the National Accounts team's role in this critical business area, from presenting various vehicles to clients to the role Specialists play.
Discussion Leader: **Sean Mackley** | Head of Broker / Dealer National Accounts & Centers of Influence | *T. Rowe Price*

11:15 AM — **Structures & Incentives**
How are National Accounts teams adapting their structures and incentives to align with the evolving landscape—and preparing for what lies ahead?
Discussion Leader: **Zach Flechtner** | Head of National Accounts | *Manulife John Hancock Investments*

12:00 PM — **Break & Box Lunch**

12:15 PM — **Training for High Performers**
How are firms equipping high performers with the strategies and resources they need to sustain their success?
Discussion Leader: **Taneka Lawrence** | Head of National Accounts | *Polen Capital*

1:00 PM — **Working with Clients & Partners**
This discussion will focus on collaborative strategies and engagement models for fostering strong client and partner relationships including:

- Data Packs
- Conference Asks
- C-Suite & Executive Engagement
- Selecting Clients/Partners
- Center of Influence

Discussion Leader: **Stacy Bernstein** | Head of Financial Intermediaries | *American Century Investments*

1:45 PM — **Recap & Closing Remarks**

2:00 PM — **Adjourn**

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