

SEPTEMBER 24 | BALTIMORE

PORTFOLIO CONSTRUCTION ROUNDTABLE

8:30 AM **Registration & Continental Breakfast**

9:00 AM **Welcome & Opening Remarks**

Kimber Lintz | Executive Director | *IMEA*

Chris Augelli | Head of Advisor Engagement, U.S. Intermediaries | *T. Rowe Price*

9:15 AM **Participant Introductions**

9:45 AM **Beyond the Hype: Putting AI Agents to Work in Portfolio Construction Teams**

This session will focus on moving beyond the hype surrounding artificial intelligence to demonstrating how AI agents can deliver real value in portfolio construction teams. Led by Tony Mackenzie, CEO of Jacobi, it will cover the latest developments for AI agents and show that they are no longer just theoretical tools, rather they are becoming integral to portfolio design, risk management, and client engagement. Tony will discuss how AI agents are capable of autonomy, decision-making, learning, and proactive interaction. Unlike early versions that were limited to simple Q&A, state of the art AI agents can orchestrate complex workflows, integrate memory for context retention, and operate with human-in-the-loop controls for oversight. Looking ahead, Jacobi will discuss a future where firms can build customized AI agents to deploy as digital workers directly within the core platforms they use to perform portfolio construction workflows and to deepen client engagement.

Tony Mackenzie | Co-Founder & Chief Executive Officer | *Jacobi Strategies*

10:00 AM **FUSE Advisory Research Survey Highlights**

Mike Evans will share highlights of FUSE's recent advisor survey on asset allocation and portfolio construction, helping investment managers understand the views of a broad advisor population.

Mike Evans | Partner & Director of Advisor & BenchMark Research | *FUSE Research Network*

10:45 AM **Break**

11:00 AM **Executive Roundtable Discussion**

This candid, interactive conversation will provide a unique forum for Portfolio Construction Leaders to take deep dives into top-of-mind issues in this critical business area. Discussion Leaders and topics include:



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Analytics Tools

- What advancements and extensions in capabilities have occurred over the past year?
- Are there any specific tools related to integrating alternatives?
 - Third party usage
 - Challenges with integration
- Self-Serve Applications
- Connecting output with your firm's philosophy/value proposition

Discussion Leader: Steve Fox | Director, Client Portfolio Solutions | *Capital Group*

AI in Portfolio Construction

This session will explore how firms are using AI can to enhance productivity, insight generation, and innovation across critical areas within the PC ecosystem including Research, Client Interaction, Software Development and Integration, and Aiding the Portfolio Strategist.

Discussion Leader: Paul Ma | Vice President, Lead Portfolio Strategist | *Fidelity Investments*

Integrating Private, Interval & Alternatives

- Effective Analytics and Educational Content
- Products with Highest Client Interest
- Generally Integrating Privates with Traditional Public Portfolio Consultations

Discussion Leader: Adam Hetts | Global Head of Multi-Asset, Portfolio Manager | *Janus Henderson Investors*

12:30 PM

Box Lunch

1:00 PM

Executive Roundtable Discussion (Continued)

Building Consultative Relationships

How are we building ongoing, consultative relationships with advisors? This discussion will revolve around the type of offer, digital experience, and tiered service models.

Discussion Leader: Chris Augelli

Head of Advisor Engagement, U.S. Intermediaries | *T. Rowe Price*

Thought Leadership & Content

- What Type of Content?
- How are You Delivering Content?
- How are You Connecting Back to a Sale or Deepening the Advisor Relationship?

Discussion Leader: John Bryson

Head of Investment Consulting, Investment Data Analytics & Education Savings | *Manulife John Hancock Investments*



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Integrating with the Sales Organization

How do we most successfully interact with our sales colleagues who are typically the client gatekeepers and the source of portfolio construction engagements?

Discussion Leader: Bud Person

Executive Vice President & Director, Portfolio Construction Solutions | *Federated Hermes*

2:30 PM

Open Discussion

A chance for participants to ask targeted questions of their peers, brainstorm possible solutions for the day's agenda topics, and pinpoint best practices.

3:00 PM

Adjourn



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