

# INSTITUTIONAL ROUNDTABLE

NOVEMBER 18 | NEW YORK

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

**9:00 AM** **Opening Remarks & Introductions**  
Kimber Lintz | Executive Director | *IMEA*  
John Pumphrey | Chief of Staff | *Synfinii*

**9:30 AM** **Institutional Trends & Unlocking Actionable Insights**  
This discussion will explore the latest institutional investment trends, investor allocations, research activity and fundraising opportunities while discovering how asset managers are leveraging advanced data analytics to unlock new value and competitive advantages.  
**Dan Caron** | Vice President, Head of Enterprise Client Group | *Nasdaq eVestment*  
**Russ Elliott** | Head of Asset Management Market Intelligence | *Nasdaq eVestment*

#### **Executive Roundtable Discussions**

These candid, interactive conversations will provide a unique forum for leaders in institutional investments to take deep dives into top-of-mind issues in this critical business area.

**10:15 AM** **Institutional Market Data—Sources, Challenges & Best Practices**  
Discover tips, tricks and strategies for producing timely, high-impact competitive analysis for institutional investment strategies.  
**Discussion Leader:**  
**Kurt Stam** | Managing Director, Head of Public Product Strategy and Development, Institutional | *Nuveen*

**11:00 AM** Break

**11:15 AM** **The Convergence of Public & Private Markets in Institutional Product Strategy**  
Explore how the traditional boundaries between public and private markets are blurring, driven by investor demand for integrated, total-portfolio solutions. Drill into the preferred structures, while navigating evolving liquidity and operational dynamics.  
**Discussion Leader:**  
**Lauren Ferry** | Head of Product Strategy, Americas | *Goldman Sachs Asset Management*



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12:00 PM

**Networking & Box Lunch**

12:45 PM

## **How to Offer Solutions Based Products/Wrappers While Growing**

In an ever-evolving marketplace, meeting client needs with tailored solutions is more critical than ever. This event explores how to navigate the challenges of delivering solutions-based products and wrappers while sustaining growth. Discover strategies to scale effectively without compromising customization—ensuring your offerings remain both innovative and aligned with client demands. How can firms streamline delivery processes and foster sustainable growth?

### **Discussion Leader:**

**Crystal McClenthen** | Head of Institutional Products | *RBC Global Asset Management*

1:30 PM

## **Consultant Relations**

This conversation will explore the intersection of asset managers and investment consultants, highlighting where their roles and perspectives align. It will also cover key industry trends, best practices, and the evolving investment landscape.

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

**David Hyman, CFA** | Partner & Head of Client Service, Financial Intermediary Practice | *Mercer*

2:15 PM

**Open Discussion**

3:00 PM

**Adjourn**

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Synthesize Data. Activate Outcomes.