

DISTRIBUTION SUMMIT

APRIL 22 | BALTIMORE

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

9:00 AM **Welcome**

Kimber Lintz | Executive Director | *IMEA*

Annie Brown | Vice President, Co-Head of USI Wealth Management | *T. Rowe Price*

9:15 AM **Opening Remarks & Introductions**

IMEA Distribution Intelligence Council Steering Committee Co-Chairs

Jim Adams | CIMA, Managing Director, Global Platforms RIA & Insurance | *MFS Investment Management*

David Borelli | Senior Vice President, National Sales Director | *Invesco*

9:45 AM **State of the Industry**

Matt Fronczke | Senior Director, Strategic Business Consulting | *SS&C Technologies*

10:15 AM **Winning with Private Markets: Where We Play & How We Win**

Private Markets are a key driver of growth and differentiation across the industry. This session will explore their strategic importance, role in firm-wide growth, and impact on client outcomes. We'll highlight the most promising distribution channels and the products gaining the most traction, providing a clear view on where to focus and how to win in this evolving space.

Moderator:

David Eikenberg | Head of US Intermediary Distribution, President RBC Funds | *RBC Global Asset Management*

Panelists:

Dave Donahoo | CFA, Head of Private Markets - Americas Wealth Management | *Franklin Templeton*

Greg Gore | Client Portfolio Manager, Head of Private Market Specialists - US Retail | *Invesco*

11:00 AM **Break**

11:15 PM **Executing a Team of Teams Strategy to Maximize Specialist Impact**

This session will explore how to unlock greater growth by aligning sellers and specialists around shared client and revenue goals. The discussion will cover how to standardize engagement models, handoffs, and deal cadence—while maintaining field flexibility—and how to reinforce collaboration through aligned incentives, clear expectations, and a shared playbook.

Moderator:

David Borrelli | Senior Vice President, National Sales Director | *Invesco*

Panelists:

Meghann Peterson | CFA, National Sales Manager | *Nuveen*

Jim Zurad | Co-Head of Intermediary Wealth Management - Field Sales | *T. Rowe Price*



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12:00 PM

Box Lunch

12:30 PM

Measure What Matters Most

This session will challenge traditional metrics and examine whether they still drive success in today's environment. We'll explore the controllable drivers that truly impact outcomes, how they have evolved over time, and what metrics will matter most going forward and examine a modern view of how to focus measurement on what drives meaningful performance and results.

Moderator:

Jeff Diamond | Global Head of Wealth Management Distribution | *Polen Capital*

Panelists:

Matt Eisenhardt | Head of Advisor Group Sales | *Capital Group*

Colin Prescott | Managing Director - Intermediary Business Development | *Diamond Hill*

1:15 PM

Cracking the Code: How Asset Managers Win Platform Access and Mindshare Inside RIA Aggregators

This session will uncover how asset managers can successfully gain platform access and influence within RIA aggregators. We'll explore who drives product decisions—whether home offices, advisors, or CIOs—highlight the most effective coverage models and identify common missteps to avoid. Panelists will share practical insights to build stronger relationships and increase mindshare with aggregator networks.

Moderator:

Jim Adams | CIMA, Managing Director, Global Platforms RIA & Insurance | *MFS Investment Management*

Panelists:

Loren Fox | Director of Research | *FUSE Research Network*

John Perry | CIMA, Head of Regional Investment Consultants, Private Client Advisory Division |
Columbia Threadneedle Investments

2:00 PM

Executive Roundtable

3:00 PM

Adjourn



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