

PRODUCT SUMMIT

MAY 6 | BOSTON



1:30 PM **Registration**

2:00 PM **Welcome**

Kimber Lintz | Executive Director | *IMEA*

Kenneth Herold | Executive Vice President, Head of Product | *Natixis Investment Managers*

2:15 PM **Opening Remarks & Introductions**

IMEA Product Council Steering Committee Chairs

Mike Twohig | Head of U.S. Public Product Development | *Goldman Sachs Asset Management*

2:45 PM **Advisor Product Preferences & Behaviors**

Product Council Sponsor Corporate Insight will share highlights of their survey reaching RIAs; advisor usage of alternatives, mutual funds and ETFs on how AI is being utilized in the advisor community.

Samantha Fritsch | Research Manager | *Corporate Insight*

3:15 PM **Regulatory Outlook: Navigating the Future of Investment Products**

This session will explore regulatory trends and developments impacting the investment product landscape. The discussion will cover a broad range of emerging and evolving investment products and issues including:

- ETF Share Class Update
- IRS Section 351 Conversions
- Crypto ETFs
- Private Assets in Regulated Funds

Moderator: Jim Hinkley | Managing Director | *Nomura Asset Management*

Sean Graber | Investment Management Partner | *Morgan, Lewis & Bockius*

4:00 PM **Product Road Mapping and Rationalization in Investment Management**

This interactive session explores how investment management firms can effectively approach product road mapping and rationalization. Participants will share best practices for prioritizing innovation, balancing speed-to-market with long-term strategic goals and navigating product development complexity. Key topics include seeding new products, streamlining product suites, partnerships and aligning offerings with client needs. Gain practical insights and peer perspectives on building a disciplined, agile product strategy.

Nick Elward | Senior Vice President, Head of Institutional Product & Head of ETFs | *Natixis Investment Managers*

Cindy Zarker | Relationship Manager | *FUSE Research Network*

Crystal McClenthen | Head of Product - U.S. | *RBC Global Asset Management (U.S.) Inc.*

4:45 PM **Breakout Sessions**

Attendees will break into small groups to discuss and share perspectives on the day's sessions.

5:30 PM **Reception**



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8:00 AM **Continental Breakfast**

8:45 AM **Opening Remarks**

IMEA Product Council Steering Committee Chairs

Mike Twohig | Head of U.S. Public Product Development | *Goldman Sachs Asset Management*

9:00 AM **Digital Assets and the Future of Asset Management**

Join us for a forward looking discussion on digital assets, including cryptocurrencies and tokenization, and the transformative role these technologies are playing in the asset management industry. The conversation will explore how cryptocurrencies are evolving from niche instruments into institutionally relevant asset classes, shaping portfolio construction, risk management, and client demand. We'll also examine tokenization, the representation of traditional and real world assets on distributed ledger technology, and its potential to enhance liquidity, improve operational efficiency, and unlock new investment models through fractional ownership and programmable assets.

Moderator: Ben Stewart | Head of Business Strategy & Development, Fundamental Equities and Listed Real Assets | *Invesco*
Kathleen Wrynn | Global Head of Digital Assets | *Invesco*

9:45 AM **How Will M&A Change Product**

Mergers and acquisitions are reshaping the investment management landscape, driving firms to rethink their product strategies, streamline offerings, and unlock new growth opportunities. This session will explore how M&A activity is influencing product innovation, rationalization, and differentiation.

Ryan Foreman | Associate Principal, US Solutions | *Broadridge*

10:30 AM **Break**

10:45 AM **Product Optimization in Action: Solving for Complexity and Growth**

This interactive session will engage participants in small-group discussions around a real-world "solve-for" scenario focused on designing an optimal product organization for today's complexity and future growth. Each group will explore product's strategic role including key responsibilities, decision rights, and organizational alignment across asset classes, vehicles, and distribution channels. Through collaboration and peer exchange, participants will develop practical, actionable solutions and share key takeaways to inform broader discussion.

Discussion Leader: Jennifer Debrosky | Senior Director, Product Manager Multi-Asset Strategies | *American Century Investments*
Jim Hinkley | Managing Director | *Nomura Asset Management*

11:45 AM **Box Lunch & Product Optimization in Action Highlights**

Each group will share highlights of their discussions.

1:00 PM **Executive Roundtable**

An interactive discussion to synthesize the day's insights and explore additional industry trends and challenges. This session provides an opportunity to dive deeper into strategic questions, share experiences, and gain perspectives from peers across firms, building on the ideas generated throughout the day.

2:00 PM **Adjourn**



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