

CMO ROUNDTABLE

JUNE 10 | CHICAGO

8:00 AM

Continental Breakfast

8:30 AM

Welcome

Kimber Lintz | Executive Director | *IMEA*

Tara Giuliano | Chief Marketing Officer | *Nuveen* | *IMEA Marketing Council Steering Committee Co-Chair*

Opening Remarks & Introductions

IMEA Marketing Council Steering Committee Co-Chairs

Jessica Fernandez | Global Chief Marketing Officer | *Direxion* | *IMEA Marketing Council Steering Committee Co-Chair*

9:00 AM

The Intelligent Evolving Investor: Considerations for Next Generation Marketing and Distribution Strategy

An interactive discussion reviewing the evolution of investors themselves, their priorities and expectations, and the strategic imperatives facing our asset management marketing teams. As a new generation of investors begins to reshape the client landscape what are industry leaders thinking about and doing differently?

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

Michael Winnick | Head of Advisor Target | *Broadridge*

9:45 AM

Brand Partnerships

This conversation will examine how CMOs evaluate the value of brand partnerships from smaller, event-driven collaborations to large-scale sponsorships. We'll focus on how firms define success, measure brand impact, and assess whether these efforts drive meaningful business outcomes, including any connection to AUM.

Discussion Leader: Tara Giuliano | Chief Marketing Officer | *Nuveen*

10:45 AM

Break

11:00 AM

Rewiring Marketing for the AI Era

What's real and what's hype? As AI reshapes how audiences discover and evaluate brands, marketers must rethink content, reputation and visibility strategies. This session explores the evolving search landscape, AI-driven decision-making, and strategies for improving discoverability, strengthening authority, and driving outcomes.

Dan Allocca | Partner | *Prosek Partners*

11:45 AM

Box Lunch



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12:15 PM

Growth Marketing

How are analytics truly shaping growth marketing today? This discussion will dive into the practical ways teams are using data to drive performance—from campaign optimization to strategic planning and budget decisions in partnership with finance. Expect a highly tactical exchange, with participants sharing the 3–5 key metrics they rely on most to guide decisions and measure success.

Discussion Leader: Jessica Fernandez | Global Chief Marketing Officer | *Direxion*

1:15 PM

From AI Experimentation to Mature Operating Models

How are firms experimenting with AI agents to augment teams, streamline execution, and enhance decision-making across marketing functions? We'll compare practical use cases against early hype, sharing what's working, what isn't, and where adoption is still falling short. In addition, we'll explore how AI agents may reshape team structures, redefine roles, and influence how we think about hiring, skill sets, and operating models in the future.

Discussion Leader: Jen Ball | Chief Marketing Officer | *Franklin Templeton*

2:15 PM

Break

2:30 PM

Finance & Technology Partnerships

Strong alignment across marketing, finance, and technology is increasingly critical to driving impact, often shaped by the dynamics of the CFO–CEO relationship. This discussion will explore how CMOs are navigating and strengthening these partnerships, and how they influence decision-making, resource allocation, and overall team success.

Discussion Leader: Pinki Mehta | Co-Chief Marketing Officer | *AllianceBernstein*

3:30 PM

Open Discussion

An interactive peer exchange designed to expand on the day's themes and allow attendees to discuss additional priorities, challenges, and emerging trends shaping investment management marketing leadership.

4:00 PM

Adjourn



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