

INTERNAL SALES DESK SUMMIT

JUNE 4 | ATLANTA

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

9:00 AM

Welcome

Kimber Lintz | Executive Director | *IMEA*

Andrew Phillips | Head of Internal Sales & WMI Learning & Development | *Invesco*

Opening Remarks & Introductions

IMEA Distribution Intelligence Council Steering Committee Co-Chairs

Bill Jacobs | Senior Vice President, Head of Internal Sales for U.S. Wealth Management | *Franklin Templeton*

Beau Bokelman | Managing Director, Head of Internal Sales | *Janus Henderson Investors*

9:30 AM

AI Won't Replace Internals — But It Will Change Them

How AI is reshaping the internal sales desk.

Nitin Dua | AI & Future of Sales SME | *Deloitte*

10:15 AM

Break

10:30 AM

Client Perspective Panel

Hear from experienced financial advisors on what they find most valuable when working with asset management partners.

Discussion Leader:

Jennifer Round | Senior Vice President, Sales | *Natixis Investment Managers*

Panelists:

Andy Harbour, CFP, CIMA, CRPS | Managing Director, Financial Advisor | *Morgan Stanley*

Dan Kundla, CFP | Senior Vice President of Investments | *Platinum Wealth Management of Buckhead*

11:30 AM

Box Lunch

12:00 PM

Operating Models

Discussion will focus on how firms are evolving internal sales operating models, including channelized vs. de-channelized coverage, specialist and hybrid roles, headcount strategy, and team structure. The session will also explore how firms are approaching AI to improve advisor coverage, drive scalable growth, and increase operational efficiency.

Discussion Leader:

Bill Jacobs | Senior Vice President, Head of Internal Sales for U.S. Wealth Management | *Franklin Templeton*

12:45 PM

Talent & Recruiting

A conversation on talent and recruiting approach for the Internal Sales Desk, including hiring strategy, development priorities, and future bench strength.

Discussion Leaders:

Beau Bokelman | Managing Director, Head of Internal Sales | *Janus Henderson Investors*

Andrew Phillips | Head of Internal Sales & WMI Learning & Development | *Invesco*

1:30 PM

Recap & Closing Remarks

2:00 PM

Adjourn



EVENT
HOST



Invesco