

NATIONAL ACCOUNTS SUMMIT

SEPTEMBER 23 | BOSTON

8:00 AM Continental Breakfast

8:30 AM **Welcome, Opening Remarks & Introductions**

Deb Wetherbee | Senior Business Development Director | *IMEA*

IMEA National Accounts Council Steering Committee Member

Zach Flechtner | Head of National Accounts | *Manulife John Hancock Investments*

IMEA National Accounts Council Steering Committee Chair

Sean Mackley | Head of Broker / Dealer National Accounts & Centers of Influence | *T. Rowe Price*

8:45 AM **Consultant Perspective: The Forces Reshaping National Accounts**

Explore the trends redefining intermediary distribution — from AI and evolving advisor engagement to product innovation and changing sales models. Gain an outside perspective on the opportunities and challenges that will shape National Accounts over the next several years.

9:30 AM **Product Proliferation: SMA, Active ETFs, Alts, Oh My.**

As investment vehicles continue to expand, National Accounts teams are navigating increasingly complex platform conversations. Discuss how firms are prioritizing product launches, positioning new capabilities, and helping home offices evaluate a growing range of solutions.

Discussion Leader:

Zach Flechtner | Head of National Accounts | *Manulife John Hancock Investments*

10:15 AM **Break**

10:30 AM **Client Perspective Panel: Behind the Curtain**

Hear directly from gatekeepers and home office leaders about today's due diligence process, what differentiates asset managers, and how firms can build stronger, more strategic platform relationships.

Discussion Leader:

Stacy Bernstein | Head of Financial Intermediaries | *American Century Investments*

11:30 AM **Lunch**



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12:00 PM

The Partnership Advantage

Winning on a platform requires more than strong products. Explore how National Accounts teams collaborate with sales, marketing, product, and key partners to deepen relationships, drive executions and create better outcomes for advisors and clients.

Discussion Leader:

Diane Marzula | Senior Vice President, Head of Global Accounts | *Federated Hermes*

12:45 PM

Designing the Modern National Accounts Organization

As the role of National Accounts continues to evolve, so do team structures, responsibilities, and incentive models. Share how firms are organizing for growth, aligning resources, and developing teams to meet the changing demands of intermediary distribution.

Discussion Leader:

Sean Mackley | Head of Broker / Dealer National Accounts & Centers of Influence | *T. Rowe Price*

2:00 PM

Closing Remarks & Adjourn

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