PORTFOLIO CONSTRUCTION ROUNDTABLE

OCTOBER 14 | BALTIMORE

9:00 AM — **Registration & Continental Breakfast**

9:30 AM — **Welcome, Opening Remarks & Introductions**
Kimber Lintz | Executive Director | *IMEA*
Chris Augelli | Head of Advisor Engagement, U.S. Intermediaries | *T. Rowe Price*

9:45 AM — **Participant Introductions**

10:15 AM — **Jacobi Remarks | Roundtable Sponsor**
Tony Mackenzie | Co-Founder | *Jacobi Strategies*

10:45 AM — **FUSE Advisory Research Survey Highlights**
Mike Evans will kick the day off sharing highlights of FUSE's recent advisor survey on asset allocation and portfolio construction, helping investment managers understand the views of a broad advisor population.
Mike Evans | Partner & Director of Advisor & BenchMark Research | *FUSE Research Network*

11:45 AM — **Box Lunch**

12:30 PM — **Executive Roundtable Discussion**
This candid, interactive conversation will provide a unique forum for Portfolio Construction Leaders to take deep dives into top-of-mind issues in this critical business area.

AI in Portfolio Construction
This session will explore how firms are using AI to enhance productivity, insight generation, and innovation across critical areas with the PC ecosystem including Research, Client Interaction, Software Development, Analytics Tools and Integration and Aiding the Portfolio Strategist.
Discussion Leader: **Lauren Pfendt** | Senior Associate, Portfolio Solutions | *WisdomTree*

Integrating Private, Interval & Alternatives
- Effective Analytics and Educational Content
- Products with Highest Client Interest
- Generally Integrating Privates with Traditional Public Portfolio Consultations

Discussion Leader: **Mark Barile** | Senior Manager - Portfolio Consulting & Analytics | *Capital Group*

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Measuring Impact
- ROI Measurement
- Defining Wins
- Integration with the Sales Organization

Discussion Leader: **John Bryson** | Head of Investment Consulting, Investment Data Analytics & Education Savings *Manulife John Hancock Investments*

2:00 PM **Break**

2:15 PM ***Joint Session | Portfolio Construction & Models Roundtables***

Panel Discussion: Evolving from Transactional to Ongoing Relationships

This session will explore strategies for evolving point-in-time portfolio construction engagements into ongoing, customized model portfolio relationships with financial advisors. The discussion will examine the critical elements for success, including well-defined advisor journeys, integrated human and digital support models, and continuity of relationship management.

Moderator: **Chris Augelli** | Head of Advisor Engagement, U.S. Intermediaries | *T. Rowe Price*

Panelists:

Emory Redd | Director of Portfolio Construction Solutions | *Federated Hermes*

Tom Casperite, CFA | Head of Portfolio Construction Specialists | *T. Rowe Price*

Rick Casagrande | Head of Portfolio Advisory | *Invesco*

3:15 PM **Open Discussion**

A chance for participants to ask targeted questions of their peers, brainstorm possible solutions for the day's agenda topics, and pinpoint best practices.

4:00 PM **Adjourn**

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