MODELS ROUNDTABLE

OCTOBER 15 | BALTIMORE

OCTOBER 14 | *Joint Session | Portfolio Construction & Models Roundtables*

2:00 PM

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*

OCTOBER 15 | *Models Roundtable*

8:30 AM

Registration & Continental Breakfast

9:00 AM

Welcome, Opening Remarks & Introductions
Kimber Lintz | Executive Director | *IMEA*
Josh Horesh | Head of U.S. Model Portfolio Distribution | *T. Rowe Price*

9:15 AM

Customization, Private Markets, and the Next Phase of Growth for Asset Allocation Models
As model portfolios continue to gain traction among advisors, providers are expanding capabilities through customization, tax-aware solutions, and private market integration. Join Cerulli for a roundtable discussion on the future of model portfolios, emerging product and distribution trends, and the strategic decisions providers must make to differentiate and drive adoption in an increasingly competitive market. Discussion topics will include:

- Are model portfolios moving beyond a scalability tool to become a primary portfolio construction framework?
- How are providers approaching the integration of private market strategies within models?
- What are advisors demanding in terms of customization, tax efficiency, and implementation support?
- Where should providers focus product development and distribution investments over the next three to five years?

Bing Waldert | Managing Director of Research | *Cerulli Associates*

10:00 AM

Break

10:15 AM

Executive Roundtable Discussion
This candid, interactive conversation will provide a unique forum for leaders in Model Strategies to take deep dives into top-of-mind issues in this critical business area.

IMEA | EVENT HOST T.RowePrice

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Client Preferences & Trends
Discussion focused on the trends and service offerings of:
- Public / Private / Intervals
- SMAs / Active / Passive Structures, including Active ETFs
- RIA Channel vs IBD vs Wires
- Client Support Beyond Portfolio Construction Teams
- Customization
- Partial Portfolio Solutions / Completion Models
- Transaction Services / Capabilities

Discussion Leader: **Baker Vitale** | Head of Portfolio Design Services | *BlackRock*

Distribution Strategy
- Team Structure
- Client Segmentation Strategy
- Channel Focus
- Content & Specialist Support Strategy
- How to Grow
- AI Utilization
- Preferred Technology Tools & Platforms

Discussion Leader: **Josh Horesh** | Head of U.S. Model Portfolio Distribution | *T. Rowe Price*

11:15 AM **Lunch**

11:45 AM **Executive Roundtable Discussion Continued**

Thought Leadership & Content
This conversation will focus on ongoing insights for custom model relationships.
- Scalable production of white labeled custom models content
- Scaling Custom Content

Discussion Leader: **Tom Landhauser, CFA** | Model Portfolio Specialist | *Invesco*

Custom Models Deep Dive
Discussion using FUSE Research survey findings on custom models to shape future research questions and industry insights.

Discussion Leaders:
Mike Evans | Partner & Director of Advisor & BenchMark Research | *FUSE Research Network*
John Bryson | Head of Investment Consulting, Investment Data Analytics & Education Savings *Manulife John Hancock Investments*
Chris Augelli | Head of Advisor Engagement, U.S. Intermediaries | *T. Rowe Price*

1:00 PM **Adjourn**

IMCA | EVENT HOST T.RowePrice