MARKETING SUMMIT

OCTOBER 19 | BOSTON

1:30 PM	**Registration**
2:00 PM	**Welcome** **Kimber Lintz** | Executive Director | *IMEA* **Dana McCullough** | Senior Strategic Relationships Marketing Manager | *Franklin Templeton*
	Opening Remarks **Jessica Fernandez** | Global Chief Marketing Officer | *Direxion* IMEA Marketing Council Co-Chair
2:15 PM	**Industry Perspective** **Neil Bathon** | Founder & Managing Partner | *FUSE Research Network*
2:45 PM	**Inside the Advisor Mindset: Brand, Trust, and Product Demand in Asset Management** This session will present key findings from the latest FT Fund Image US study of US financial advisors. It will cover advisor perceptions of asset managers, the drivers of trust and consideration, evolving product demand, and emerging themes shaping the industry — including private markets, ETFs, AI and tokenized investment products. **Daniel Rothman** | Director of Insight | *Financial Times*
3:30 PM	**Break**
3:45 PM	**Breakout Discussion: Shaping the Marketing Strategy** Attendees will discuss how the themes and trends highlighted in the FT presentation apply to their individual roles and organizations. The conversation will provide an opportunity to exchange perspectives, share experiences, and explore how each role can contribute to a more effective, cohesive marketing strategy.
4:30 PM	**Breakout Highlights** A brief recap of key takeaways and insights from the small-group conversations, highlighting common challenges, fresh ideas, and opportunities identified by participants.
5:00 PM	**Adjourn**
	Cocktail Reception Sponsored by Synthesis Technology Join attendees for a cocktail reception following Day One of the Summit designed to foster meaningful conversations and new connections **Amber Road | Lobby/Bar** | Franklin Templeton | 100 Federal Street, Boston, MA 02110

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8:30 AM — **Continental Breakfast**

9:00 AM — **Opening Remarks**
Jessica Fernandez | Global Chief Marketing Officer | ***Direxion***
IMEA Marketing Council Co-Chair
Dave Myron | Senior Vice President, Financial Services & Solutions | ***Seismic***
Marketing Council Partner

9:15 AM — **Content That Works: Aligning Strategy, Expertise & Impact**
What makes content valuable—and how can marketing teams create more of it without simply creating more content? Content management leaders will share approaches for identifying high-value topics and expertise, collaborating across teams, extending the life of existing content, and using AI, distribution, and measurement to increase effectiveness.
Moderator: **Mario Favetta** | Relationship Manager | ***FUSE Research Network***
Panelists:
Colin Hopkins | Senior Vice President, Head of Editorial and Content | ***Natixis Investment Managers***
Chris Davis | Managing Director, Head of Investment Communications | ***Nuveen***
Steve King | Senior Vice President of Product & Channel Marketing | ***TCW***

10:00 AM — **Paid & Social Media: Strategy, Participation & Impact**
How can investment management firms use paid and social media more effectively? This discussion will explore internal social media policies, effective partnerships, techniques for uncovering overlooked opportunities, and ways to measure impact and demonstrate value.
Moderator: **Pinki Mehta** | Co-Chief Marketing Officer | ***AllianceBernstein***
Panelists:
Eliana Birn | Vice President, Global Social Strategy & Enablement | ***Nuveen***
Callie Starbuck | Managing Director, Global Brand Marketing | ***Nuveen***

10:45 AM — **Break**

11:00 AM — **Inside the STAR Awards: A Judge's Perspective**
What makes an entry stand out? Hear directly from a 2026 Asset Management STAR Awards judge on the ideas, strategies, and submissions that caught their attention this year.

11:15 AM — **Connecting the Digital Dots**
How can investment management firms create a connected digital strategy across sales, marketing, websites, and all the things? This discussion will explore how teams can collaborate more effectively, align digital efforts with business priorities and client needs, and use measurement and insights to understand impact and inform what comes next.
Caitlin Baggeroer | Program Marketing Director | ***Franklin Templeton***
Judy May | Director, Intermediary Marketing | ***RBC Global Asset Management (U.S.) Inc.***
Kim Stokes | Senior Vice President, Digital Marketing Platform Strategy & Operations | ***HarborVest Partners, LLC***

12:00 PM — **Box Lunch & Executive Roundtable**
An engaging peer-to-peer discussion focused on sharing best practices, real-world experiences, and practical insights. Attendees will have the opportunity to ask questions, exchange perspectives, and learn from their colleagues.

1:00 PM — **Adjourn**

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