

DATA ROUNDTABLE

OCTOBER 6 | CHICAGO

8:00 AM — **Registration & Continental Breakfast**

8:30 AM — **Welcome Remarks & Introductions**
Kimber Lintz | Executive Director | *IMEA*
Kevin Crouch | Senior Vice President, Head of Data Science | *Calamos Investments*

9:00 AM — **Synfinii Remarks | Roundtable Sponsor**
AI Didn't Break Your Data. Your People Were Quietly Fixing It
Most firms are using AI in distribution, and the easy wins are real. The transformational wins are harder to find, and the reason usually isn't the model. It's a set of data problems that have been there for years, quietly caught by the people who knew which source to trust. AI takes those people out of the loop, and the old problems come back with higher stakes. We'll open the day with situations we see repeatedly across the firms we work with: what they look like from the inside, the reasonable decisions that lead there, and what to focus on instead. We'll close with three quick checks on where your own data is today.
Chris Poisson | Chief Transformation Officer | *Synfinii*

9:30 AM — **The Modern Data Foundation: From Strategy to Practical AI**
Most firms have a data strategy. Far fewer have successfully bridged the gap between strategy and execution, turning data from disparate systems that were never designed to work together into a trusted foundation for better decisions and, increasingly, AI. This business-focused discussion will explore how firms are putting data to work, the decisions it can unlock, and the practical steps required to move from strategy to measurable impact.
Andrea DeSosa | Global Capital Markets GTM Lead | *Databricks*

10:00 AM — **Break**

10:15 AM — **Defining a Single Source of Truth**
Creating a trusted, enterprise-wide source of truth is essential for delivering reliable data, actionable insights, and informed decision-making. This session will examine the governance frameworks, technology, and data management approaches firms are using to improve data quality, ownership, and consistency while building a unified view.
Discussion topics include:
- What does a single source of truth look like in practice?
- How are firms establishing and maintaining it?
- Managing data directly versus relying on CRM and other business applications
- Integrating CRM, flows, AUM, and third-party data into a unified view

John Hammar | Chief Technology Officer | *Polen Capital*

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11:00 AM	**Break**
11:15 AM	**Organizational Structure & Building Teams for the Future** As data and analytics become increasingly central to business strategy, firms are rethinking how they organize talent, develop capabilities, and structure teams for the future. The group will explore approaches for aligning organizational models with evolving business needs, strengthening cross-functional collaboration, and building teams equipped to support future growth and innovation.
12:00 PM	**Box Lunch**
12:30 PM	**Strategic Priorities & Current Challenges** Investment management firms are balancing long-term strategic objectives with an increasingly dynamic business environment. This conversation will provide an opportunity to compare priorities across organizations, discuss the initiatives receiving the greatest investment, and examine the operational, regulatory, and market challenges shaping decision-making today. **Kevin Crouch** | Senior Vice President, Head of Data Science | *Calamos Investments*
1:15 PM	**Open Discussion** A chance for participants to ask targeted questions of their peers, share relevant experiences, brainstorm possible solutions for the day's agenda topics, and pinpoint best practices.
2:00 PM	**Adjourn**

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