ETFs ROUNDTABLE

OCTOBER 29 | NEW YORK

8:00 AM	**Continental Breakfast**
8:30 AM	**Welcome, Opening Remarks & Introductions** **Kimber Lintz** | Executive Director | *IMEA* **Noel Archard** | Senior Vice President, Global Head of Product Solutions & Marketing | *AllianceBernstein*
9:00 AM	**The ETF Shift: How Advisors Are Investing and Managers Are Adapting** Changes in the wealth management business are accelerating the adoption of ETFs by advisors. This interactive presentation will delve into the ways that advisors use ETFs, how ETFs fit into the broader investing landscape, and what asset managers are doing to improve ETF distribution. **Loren Fox** | Director of Research | *FUSE Research Network*
9:45 AM	**Marketing that Moves the Needle** With marketing budgets continuing to evolve, firms are reassessing where they invest, how they measure success, and which strategies deliver the greatest impact. This discussion will examine how organizations are allocating marketing resources, whether financial advisors or end investors should be the primary audience, and the roles that brand and product play in driving ETF growth.
10:30 AM	**Break**
10:45 AM	**Winning Shelf Space** As distributors continue to reduce the number of asset management partners they support, earning—and retaining—a place on platforms has become increasingly competitive. Participants will discuss how firms are differentiating themselves, strengthening distributor relationships, and positioning their ETF offerings for long-term success. **Adam Phillips** | Chief Operating Officer | *VanEck*
11:30 AM	**Lunch**
12:30 PM	**Data Dialogue** Incomplete, inconsistent, and fragmented data remains a persistent challenge across the industry. This session will examine how firms are maximizing the value of the data they have today while partnering with providers to improve data quality, coverage, and usability. **Joe Grogan** | Head of Distribution, Americas | *WisdomTree Asset Management*
1:15 PM	**Designing the Modern ETF Organization** As the ETF marketplace continues to evolve, firms are rethinking how they build, develop, and support high-performing teams. This discussion will explore talent strategies, training and development, compensation structures, and approaches for fostering enterprise-wide engagement to ensure ETFs remain a strategic priority across the organization. ***Discussion Leader:*** **Noel Archard** | Senior Vice President, Global Head of Product Solutions & Marketing | *AllianceBernstein*
2:00 PM	**Adjourn**

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