

LEADERSHIP SUMMIT 2026

NOVEMBER 11 | *NEW YORK*

1:00 PM	**Registration**
1:30 PM	**Welcome, Opening Remarks & Introductions** **Kimber Lintz** | Executive Director | *IMEA* **Rocco Benedetto** | Executive Vice President, Head of US Retail Distribution | *Invesco* ***IMEA Executive Committee Vice President***
	Opening Remarks **Jim Cove** | Executive Vice President, Head of US Marketing | *Natixis Investment Managers* ***IMEA Executive Committee Chair***
1:45 PM	**Participant Introductions**
2:15 PM	**State of the Industry** Shifting client demands and accelerating technology are reshaping the sale and service of retail investment products throughout the United States, pushing asset managers to move beyond transactional product sales into delivering investment performance through outcomes, services and experiences. These forces are blurring the lines between advising and investing, forcing asset managers to rethink their operating models, and emphasizing the role of delivery in distribution. Will AI democratize the tools needed for this change, leveling the playing field? Or will the combined weight of new needs trigger an arms race that further consolidates the asset management industry? ***Oliver Wyman's officers will discuss:*** • The rise (and rise) of ETFs, SMAs, and custom models • The role of customization and personalization • How tax optimization is reshaping asset management's value proposition • The crowded battlefield for revenue growth ***Presenters:*** **Ben Phillips** | Partner | *Oliver Wyman* **Joonsuk Lee** | Principal | *Oliver Wyman*
3:00 PM	**Break**

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3:15 PM	**Executive Roundtable** An interactive discussion for attendees to further examine points raised by Ben Phillips and candidly discuss additional topics of interest with colleagues. ***Moderators:*** ***IMEA Executive Committee Members*** **Ben Phillips** | Partner | *Oliver Wyman*
4:00 PM	**IMEA Update**
4:45 PM	**Philanthropic Day** IMEA members will provide hands-on support to Ronald McDonald House Charities by assembling cookie cart kits.
5:30 PM	**Networking Reception | Sponsored by Wealth Vista**
6:30 PM	**Adjourn**

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***NOVEMBER 12** | NEW YORK*

8:00 AM	**Continental Breakfast**
8:30 AM	**Opening Remarks** **Kimber Lintz** | Executive Director | *IMEA* **Rocco Benedetto** | Executive Vice President, Head of US Retail Distribution | *Invesco* ***IMEA Executive Committee Vice President***
8:45 AM	**The Solution-Led Asset Manager: Redefining How We Create Value** As investors increasingly seek outcomes rather than products, asset managers are rethinking how they create and deliver value. This session will explore what it takes to become a truly solutions-led organization, examining how firms align product, distribution, marketing, technology, and investment capabilities around client needs. Industry leaders will discuss the evolution of solutions selling, the organizational changes required to break down silos, and the growing importance of building integrated portfolios that seamlessly combine public and private market exposures to help clients achieve their objectives. ***Moderator:*** **Ed Nini** | Managing Director, Head of Product | *Principal Asset Management* ***Panelists:*** **Karl Desmond** | Head of Model Portfolio Management | *Invesco* **Owais Rana** | Managing Director – Head of Investment Solutions | *Principal Asset Management* **Izaak Mendelson** | Head of Model Portfolios | *Vanguard*
9:30 AM	**The Investment Management Crystal Ball: What We Got Right, Wrong & What's Next?** What did the industry see coming, and what did we get wrong? Senior leaders from Broadridge, FUSE and SS&C look back at the trends reshaping asset management, from ETFs and RIAs to alternatives and private markets, and debate what's next. The conversation will explore how AI, personalization, consolidation and changing investor behavior are transforming the value chain and what investment managers should start, stop and rethink today to stay ahead. ***Moderator:*** **Rocco Benedetto** | Executive Vice President, Head of US Retail Distribution | *Invesco* ***Panelists:*** **Tim Kresl** | Managing Principal, Head of US Client Success | *Broadridge* **Neil Bathon** | Managing Partner | *FUSE Research Network* **Lee Kowarski** | Head of Distribution Solutions | *SS&C Technologies*
10:15 AM	**Break**.

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10:30 AM	**Future of AI Overview & Breakouts** This hands-on AI Experience will explore how to turn modernization strategy into tangible, AI-enabled prototypes, preparing leaders to rewire how the business runs over the next 10-15 years. Lab Objectives: • Understand how AI is changing investment management • Explore practical AI use cases across business functions • Experience AI tools firsthand through collaborative exercises • Think about modernization and "rewiring" operating models, not just technology adoption ***Presenter:*** **Nitin Dua** | Principal | *Deloitte*
10:55 AM	**Breakout Workshop Exercises** Participants will work in facilitated groups to rapidly shape an AI-enabled experience for a real investment management challenge. Each group will leave with a tangible, lightweight prototype.
11:45 PM	**Lunch & Break**
12:15 PM	**Group Report-Out & Discussion** Groups will share key findings and insights to connect use cases and identify common themes and opportunities.
1:00 PM	**Adjourn**

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