COO OF DISTRIBUTION ROUNDTABLE

NOVEMBER 11 | *NEW YORK* | ***AGENDA***

IMEA COO of Distribution Roundtable
Distribution is undergoing significant transformation. Changing client expectations, new distribution models, AI, increasingly centralized data, and the growing need to connect strategy with operational execution are reshaping how distribution organizations are built and run. At the center of this evolution is the COO of Distribution.

Today's forum brings a select group of senior leaders responsible for distribution operations, strategy, and enablement for an informal, candid discussion on the evolving role and strategic impact of this function within investment management. The conversation will provide an opportunity to compare organizational approaches, share priorities and experiences, and explore the challenges and opportunities shaping the role.

Role & Organizational Structure
- How firms define the COO of Distribution role, its scope and responsibilities.
- Organizational models, reporting relationships, team structures, and paths into the role.

Discussion Leaders:
Vanessa Touma | COO, Americas Distribution | *Invesco*
Kimberly Roy | Chief Operating Officer | *Franklin Templeton*

Strategic Priorities & Key Initiatives
- Key initiatives and priorities being led by COO organizations.
- Connecting distribution strategy with operational execution, efficiency, and business growth.

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Challenges & Opportunities
- The most pressing challenges facing distribution COOs and their organizations.

Discussion Leader:
Sheila Rapple | Global Distribution Chief Operating Officer | *Blackstone*

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Technology, Data & AI
- The evolving role of AI, automation, and technology in distribution.
- Leveraging centralized data, analytics, and emerging capabilities to support better decision-making and execution.

Discussion Leader:
Graham Brewster | Head of Distribution Operations & Enablement | *Natixis Investment Managers*

Looking Ahead
- How the COO of Distribution role is likely to evolve.
- Emerging capabilities and priorities that will shape the function's future.
- Key takeaways, common themes, and opportunities for continued peer dialogue.

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