



Fall 2022 Agenda Atlanta, GA

Updated: October 21

Monday, October 24

All Day: Golf, Tennis, Atlanta Excursions

4:00 PM: eVestment hosted reception at 100 Glenridge Point Parkway
(Shuttle from hotel at 4pm and returning by 6:30pm)

6:30 PM: Optional Dinners open to all (meet in Lobby)

Tuesday, October 25

6:30 AM: Optional: Jog, Run, Tennis

8:00 AM: **Registration and Networking Breakfast** (Ballroom)

9:00 AM: **Kickoff and Opening Remarks** Hazem Gamal, COO, SME Forum

9:30 AM: **Asset Management Marketing – Arts and Crafts or Revenue Driver?** Tim Kresl, Broadridge

10:30 AM: Breakout Sessions:

S1 Mercer: Working Session: Establishing Sales Activity Benchmarking

S2 N/A: DEI session converted to Lunch Topic Table on Tue & Wed

S3 Kern: Developing Next-Best-Action Capabilities (Tools & Tech)

S4 Rogers: User Identification and Segmentation for Marketing

Noon: Networking Lunch with optional Topic and Vendor Tables (Bernstein)

1:30 PM: **Distribution Intelligence: The Next Chapter.** Panel discussion led by Scott Kasper, Olmstead Associates

2:30 PM: Networking Break

3:00 PM: Breakout Sessions:

S5 Mercer: Working Session: Defending and promoting Tech investment

S6 Porter: Impact of Third-Party service augmentation on operations

S7 Kern: More Analytics NOT Data Management

S8 Rogers: Pursuing the elusive "Client 360"

4:30 PM: **By The Numbers: How Advisor Needs Are Changing Amid Economic Uncertainty.** Bill Sheldon, MarketBridge

5:30 PM: **Reception then Dinner** for all participants and guests (Onsite)



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Wednesday, October 26

6:30 AM: Optional: Jog, Run, Tennis

7:30 AM: **Networking Breakfast** (Ballroom)

8:30 AM: ***Rethinking Distribution: Leveraging Analytics, Marketing, & New Approaches to Sales.*** Panel discussion led by Lee Kowarski, SS&C

9:30 AM: Breakout Sessions:

S9 Mercer:	Working Session: Next Best Action programs that work
S10 Rogers:	Rebalancing Digital Marketing with Distribution post pandemic
S11 Kern:	B/D Data Packs and Third-Party Data Integration
S12 Porter:	Emerging technologies in relationship intelligence

11:00 AM: Networking Break

11:15 AM: ***CDP in Asset Management: Myth and Reality*** with Marianne Hewitt, Growth Strategy Group

Noon: Networking Lunch with optional Topic and Vendor Table (Bernstein)

1:30 PM: Breakout Sessions:

S13 Mercer:	Working Session: Improving Salesforce.com for Asset Management
S14 Porter:	Implementing CDP Programs in Asset Management
S15 Rogers:	Emerging Non-US Data Sources and subscription services
S16 Kern:	Applying artificial intelligence for next best action use cases

3:00 PM: ***Digitalizing Behavioral Insights to Deliver Customized Experiences.*** Hugh Massie, DNA Behavior

4:00 PM: **Closing Reception and Networking** (In/Outdoor Terrace)

5:00 PM: Forum Concludes and Departures

6:00 PM: Optional Dinners open to all (*meet in Lobby*)