

Fall 2023 Forum Short Hills, NJ

Updated Nov 10, 2023

Monday, Nov 13

All Day: Arrivals and Check-in

Optional: Golf, Tennis, NJ area excursions

6:00 PM: Kylee Digital **Welcome Reception & Tasting** (in **Madison** off Lobby)

Tuesday, Nov 14

8:00 AM: **Registration and Networking Hot Breakfast**

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

9:30 AM: **Institutional or Retail – How about both?** *Davis Walmsley, Broadridge*

10:30 AM: **Tuesday Morning (TAM) Breakout Sessions:**

Salon A: Understanding **Institutionalization** of the Retail Market

Milburn: Institutionalizing your **CRM Platform**

Bonnel: The ABC's of Institutional **Client Onboarding**

Chatham: Return to **Mobile Platforms** and Capabilities

12:00 PM: Networking Sit Down Lunch with optional Partner/Topic Table discussions

1:00 PM: **Snowflake: Changing the Landscape of Data and Insights**, *Jill Camper*
SS&C with Panelists

1:45 PM: **Alternative Approaches to Marketing Collaboration** – *Jeremy Kees, Merrill*
Lynch and panelists

2:30 PM: **Institutional Organization Changes** – *Loren Fox, Fuse Research and Panel*

3:00 PM: **Tuesday Afternoon (TPM) Breakout Sessions:**

Bonnel: Developing Institutional **Segmentation**

Milburn: Effective Sales teams through Data-enabled Insights

Chatham: Effective Sales teams through Data-enabled Insights

Salon A: **Real world AI** in Asset Management

4:30 PM: **AI Needs Good Data Too!** *A Fireside Chat with Asad Mahmood, HSO*

5:00 – 8:00 PM: **Reception followed by Sit Down Dinner** for all participants and guests

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Wednesday, Nov 15

7:30 AM: Registration and Networking Hot Breakfast

8:30 AM: *The Rise of Enterprise RIA: Supporting Super Hybrids*, Dennis Gallant, ISS

9:15 AM: **Wednesday Morning (WAM) Breakout Sessions:**

Milburn:	Harvesting Sales and Marketing Activity
Bonnel:	Intersection of Institutional with Retail Operations
Chatham:	Preventing Cracks in the Pipeline Process
Salon A:	Using Next Best Action Signals Effectively

11:00 AM: *Evolving Approaches to Segmentation*, Lee Kowarski SS&C and Panelists

12:00 PM: Networking Sit Down Lunch

1:00 PM: *Best Practices from Asset Managers using Advisor Data* – Mark Smith,
Morgan Stanley and panelists

1:45 PM: *Accelerating Modernization Using SFDC* – Jodi Wagner SFDC and panelists

2:30 PM: **Wednesday Afternoon (WPM) Breakout Sessions:**

Milburn:	Balanced Marketing KPIs and Metrics
Ballroom:	Financial Services Cloud Working Session
Chatham:	Integrating Institutional Data
Salon A:	Best Practices with B/D, Proprietary and Advisor 3 rd Party Data

4:00 PM: Closing Reception and Networking

5:00 PM: Forum Concludes and Departures

6:00 PM: Leadership Council Offsite Dinner (By Invitation)

Thursday, November 16 SME Leadership Council

8:00 AM: Leadership Council Breakfast

8:30 AM: Leadership Council Meetings

11:00 AM: Meeting Concludes and Departures

Ballroom = BLR | Bonnel = BNL | Chatham = CHT | Milburn = MLB | Salon A = SLN