

Agenda

Monday, May 13

All Day: Arrivals and Check-in

Optional: Golf, Tennis, Charlotte area excursions

5:00 PM: [Welcome Reception](#) and Hors d'Oeuvres

until 7pm at the Coastal Kitchen in the Hilton Charlotte Uptown. All are welcome!

Tuesday, May 14

8:00 AM: Registration and Networking Hot Breakfast

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

9:30 AM: **Leveraging Data with Emerging Tech -** **Davis Walmsley, Broadridge**

10:30 AM: Tuesday Morning Breakout Sessions:

NC - Marketing	<i>Building Next-Gen Segmentation Capabilities</i>
SC - Data & AI	<i>Data Packs and Third-Party Data Integration for AI</i>
ARD - Tech & Tools	<i>CRM Innovations to support Growth in Wealth and Institutional</i>
GRA - Operations	<i>Why Do It Yourself? Outsourcing in the RFP/RFI/DDQ space</i>

12:00 PM: Networking Sit Down Lunch

1:30 PM: **Panel Discussion: The Wholesaler View** with Lee Kowarski, SS&C

2:15 PM: **Member Exchange: Fundamentals for AI** - Anthony Whitford, Olmstead

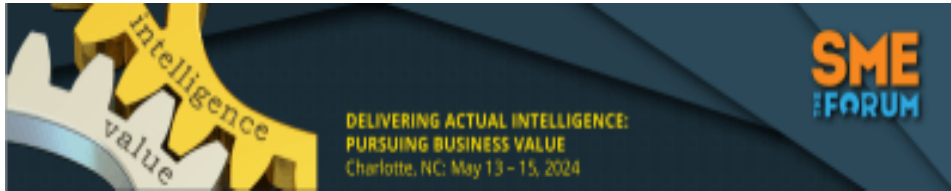
3:00 PM: Tuesday Afternoon Breakout Sessions:

ARD - Marketing	<i>Building Sales and Marketing Activity Benchmarks</i>
SC - Data & AI	<i>Use Cases across Generative AI</i>
NC - Tech & Tools	<i>Creative uses of Sales Enablement Tools</i>
GRA - Operations	<i>Content Cacophony: Why is it so Hard to Pull it All Together?</i>

4:30 PM: **Taking a Contrarian View** - Fireside Chat with David Master, CMO

5:15 PM: **Offsite Reception & Sit-Down Dinner** for all participants and guests

[King's Kitchen](#) (129 W Trade St, Charlotte, NC) – 10 Min.Walk/ 5 Min Bus



Agenda

Wednesday, May 15

8:00 AM: Registration and Networking Hot Breakfast

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

9:15 AM: What Could the Promises of AI be? - Panel with Dennis Gallant, ISS MI

10:00AM: Wednesday Morning Breakout Sessions:

NC - Marketing	Balancing Marketing KPIs and Metrics
SC - Data & AI	Data – Driving How Institutional Teams Operate
ARD - Tech & Tools	Digital Sales Rooms – Emerging Use Cases
GRA - Operations	Extending Mobile Capabilities to Meet Changing Needs

11:30 AM: Networking Sit Down Lunch

12:45 PM: Evolving Data Talent & Structures with Loren Fox, Fuse Research

1:30 PM: Wednesday Afternoon Breakout Sessions:

NC - Marketing	Key Challenges facing Institutional Sales & Marketing Teams
SC - Data & AI	Competitive Data Sources - what has changed recently
ARD - Tech & Tools	Emerging Solutions Breakout: Tifin AMP
GRA - Operations	Evolving capabilities for team intelligence and buying units

3:00 PM: Considering the Governance for AI – Fireside Chat with Alec Crawford, CEO

3:30 PM: Closing Reception and Networking – Plaza Level

5:00 PM: Forum Concludes

6:30 PM: Leadership Council Offsite Dinner (by invitation)

Thursday, May 16 SME Leadership Council (by invitation)

8:00 AM: Leadership Council Breakfast

8:30 AM: Leadership Council Meetings

11:00 AM: Meeting Concludes and Departures

NC = NC HALL **SC** = SC HALL **ARD** = ARDWELL ROOM **GRA** = GRAVES ROOM