

**INNOVATION AS ART:
EVOLVING TO IMPROVE**
Kansas City, MO: October 21-23, 2024



Agenda

(Final)

Monday, October 21

- All Day:** Arrivals and Check-in
- 5–8:00 PM:** Welcome Reception, Networking and Interactive Group Activity

Tuesday, October 22

- 8:00 AM:** Registration and Networking Hot Breakfast
- 9:00 AM:** Welcome and Opening Remarks Hazem Gamal, COO, SME Forum
- 9:30 AM:** Connecting the Dots –Using Data to Build a Distribution Playbook
with Alex Golub-Sass and Kristin Gibson (Broadridge)

10:30 AM: Tuesday Morning Breakout Sessions:

S1	Sales & Marketing	<i>Demonstrating Value: Sales Enablement Teams</i>
S2	S2 Data & AI	<i>Paths to Success: Finding AI Projects with Business Results</i>
RH	Instit'I/Wealth	<i>Onboarding: Providing Differentiating Services for Retention and Growth</i>

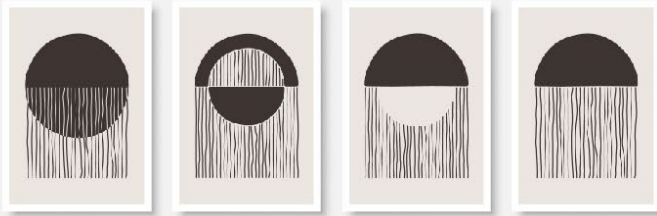
- 12:00 PM:** Networking Sit Down Lunch in the Plaza Terrace
- 1:00 PM:** Enriching Sales Enablement for Institutional Use discussion with Mark Shpizner (Centerbridge), CJ Haas (Goldman), Bill Safarik (Wellington), Zack Helgeson (Nasdaq/eVestment)
- 1:45 PM:** Emerging Technologies Usage Panel Discussion with Jonathan Wang (VanEck), Gabe Parras (Thornburg) and Loren Fox (Fuse Research)

2:30PM: Tuesday Afternoon Breakout Sessions:

S1	Sales & Marketing	<i>Navigating Emerging Strategies, Products and Platforms</i>
S2	Data & AI	<i>Driving Adoption: Use Cases for Emerging AI Solutions</i>
RH	Institutional	<i>Improving the Buying Experience: Enabling the Sellers</i>
RO	Vendor Solutions	<i>Hike2: A Data and AI Governance Framework to Consider</i>

- 4:00 PM:** Lessons Learned in MDM Implementations AM Panel: Danielle Lowe (Janus), Mel Bensouda (PIMCO) Mark Elliott (American Century) along with Echo Gonino and Jill Camper (SS&C)
- 4:45 PM** Innovation as art: Evolving to Improve, a perspective from Neeraj Arora
- 5:30–8:00** **Offsite Reception, Exhibition & Sit-Down Dinner** for all participants and guests
Kemper Museum of Contemporary Art (a five minute walk)

Breakout Rooms: S1 – Seville I S2 – Seville II RH = RockHill RO = RoanOke



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Wednesday, October 23

8:00 AM: Registration and Networking Hot Breakfast

8:45 AM: **Opening Remarks** Hazem Gamal, COO, SME Forum

9:00AM: **Harnessing the Power of Responsible AI** an exploration with Kuldeep Singh (Hike2) and Rupri Bhamra (MSCI)

9:45AM: **Transforming Marketing: The Impact of Data, AI, and Benchmarking** presentation by Oli Knight, (Alphix/Fundamental Media)

10:30AM: Wednesday Morning Breakout Sessions:

S1	Sales & Marketing	<i>Customer 360 from your CRM Platform</i>
S2	Data & AI	<i>Data Before AI: Getting Your Data Ready</i>
RH	Institutional	<i>Achieving Client Driven Experiences Efficiently</i>
RO	Innovation	<i>Innovating with AI: Are You Doing It Wrong?</i>

12:00 PM: Networking Sit Down Lunch in the Plaza Terrace

1:00 PM: Wednesday Afternoon Breakout Sessions:

S1	Sales & Marketing	<i>Evolving Structures and Organizations to Meet a Changing Industry</i>
S2	Data & AI	<i>Emerging Skills, Experiences and Roles Required in an AI world</i>
RH	Institutional	<i>Leveraging Data Sources to Improve the Growing Wealth Mandate</i>
RO	Vendor Solutions	<i>eVestment: Client Use Cases for Off-Platform Usage and Deployment</i>

2:30 PM: **Brand: How Tech and Ops Help Drive Value** Industry Discussion with Jonathan Wang (VanEck), Josh Newton (T.Rowe Price), Bill Safarik (Wellington), and Adam Feldstein (ISSMI)

3:15PM: Closing Reception and Networking

5:00 PM: Forum Concludes and Departures

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

Thursday, October 24 SME Leadership Council (by invitation)

8:00 AM: Leadership Council Breakfast

8:30 AM: Leadership Council Meetings

11:00 AM: Meeting Concludes and Departures

Breakout Rooms: S1 – Seville I S2 – Seville II RH = RockHill RO = Roanoke