

EVOLUTION IN A REVOLUTION: HOW WE ADAPT AND ADOPT New Brunswick, NJ: April 21 - 23, 2025

<u>AGENDA</u>

Monday, April 21

All Day:	Arrivals and Check-In	
5:30 – 8:00 PM:	Welcome Reception – <u>Christopher's Bar</u> , The Heldrich Hotel	

Tuesday, April 22

- 8:00 AM: Registration and Networking Hot Breakfast
- 9:00 AM: Welcome and Opening Remarks Hazem Gamal, (SME Forum)
- 9:30 AM: <u>The Evolution in the Revolution:</u> Charlie Novicki (Broadridge)

10:15 AM: Networking Break

10:30 AM: Tuesday Morning Breakout Sessions:

L iv 3	Sales & Distribution	Emerging Tools & Technologies Enabling Distribution
Segal	Marketing	Reconsidering Client Journeys by Persona
Kelly	Channel Evolution	Organizing for Diversifying Sales and Product Channels
Liv 4	Solutions Workshop	The Compliance Bridge: Unlocking the Potential of Data with AI

12:00 PM: Networking Sit Down Lunch, Christopher's Restaurant

1:30 PM: <u>Divisional Manager Panel Discussion</u> Moderated by Lee Kowarski (SS&C) with M.L. Fletcher (Northeast Divisional Manager, T. Rowe Price), Megan Hopps, (Divisional Sales Manager, John Hancock), Dominick McPeake (Co-Head of National Sales, Lord Abbett),

2:15PM: Tuesday Afternoon Breakout Sessions:

Liv 3	Sales & Distribution	Overcoming Challenges of Supporting Intermediary Sales
S egal	Marketing	Delivering ROI from Institutional Marketing Efforts
Liv 4	Data, Tech & Al	Best Practices in Capturing Value from Unstructured Data
K elly	Solutions Workshop	How to Develop and Choose Build vs. Buy Options

3:45 PM: Networking Break

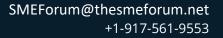
4:00 PM: <u>CRXM: 360 Customer Centricity Use Cases</u> - Francisco Quevedo (Rutgers)

4:45 PM Guest Speakers: Staying Inspired as we Evolve - Sparsh and Hiren Shah

5:30-8:00 Offsite Reception and Sit-Down Dinner at Cuzin's Seafood (78 Albany Street)

Breakout Rooms: Liv3 = Livingston III ; Liv4 = Livingston IV; Kelly and Segal are on 2







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Wednesday, April 23

- 8:00 AM: Registration and Networking Hot Breakfast
- 8:30 AM: Assessing Value from Intel-Driven Strategies Finding from Loren Fox (Fuse Research) with Mario Gallotto (Markets Intelligence, SSGA) and Joe Stewart (Distribution Enablement & Analytics, GQG)
- 9:00 AM: <u>The Last Mile of Insight Delivery: Bridging the Gap Between Data and Action</u> Presented by Nathan Stevenson (CEO ForwardLane) with Kevin Sawchuck, (Head of Distribution BI, Allspring) along with (TBA)
- 9:45 AM: Wednesday Morning Breakout Sessions:

Liv 3	Sales & Distribution	Strengths of CRMA, Tableau, and Power BI for Sales Enablement
S egal	Marketing	Keys to Successful Partnerships between Marketing & Distribution
Kelly	Channel Evolution	Aligning Capabilities for Evolving Channels
Liv 4	Data, Tech & Al	Navigating the values of CDPs, Data Lakes and MDMs

- **11:15 AM:** <u>Leveraging AI to Drive Sales</u> Presentation by Phil Cohn (Rutgers) with Jonathan Wang (CTO, VanEck) and Lynda Koster (CEO, Growthential)
- 12:00 PM: Networking Sit Down Lunch, Christopher's Restaurant

1:00 PM: Wednesday Afternoon Breakout Sessions:

L iv 3	Sales & Distribution	Emerging Success Cases in Trigger-based Sales Campaigns
S egal	Marketing	When to use Marketing vs Sales-driven Leads
Liv 4	Data, Tech & Al	Extracting Value from Data Packs and 3 rd Party Sources
Kelly	Solutions Workshop	Compliant Content at the Speed of AI

- 2:30 PM: <u>Closing General Session What Can We Apply Today Strategy and Tactics</u> Led by Adam Feldstein (ISS Market Intelligence)
- 3:30PM: Closing Reception and Networking
- 5:00 PM: Forum Concludes and Departures
- 6:30 PM: Leadership Council Offsite Dinner (by invitation)

Thursday, April 24 SME Leadership Council (by invitation)

- 8:00 AM: Leadership Council Breakfast and Meetings
- **11:30 AM:** Meeting Concludes and Departures

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SMEForum@thesmeforum.net +1-917-561-9553