



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

SME
THE FORUM

AGENDA



Monday, April 21

All Day: Arrivals and Check-In
5:30 – 8:00 PM: Welcome Reception – [Christopher's Bar](#), 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: The Evolution in the Revolution: Charlie Novicki (Broadridge)

10:15 AM: Networking Break

10:30 AM: Tuesday Morning Breakout Sessions:

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

12:00 PM: Networking Sit Down Lunch, [Christopher's Restaurant](#)

1:30 PM: Divisional Manager Panel Discussion 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:

<i>Liv 3</i>	Sales & Distribution	<i>Overcoming Challenges of Supporting Intermediary Sales</i>
<i>Segal</i>	Marketing	<i>Delivering ROI from Institutional Marketing Efforts</i>
<i>Liv 4</i>	Data, Tech & AI	<i>Best Practices in Capturing Value from Unstructured Data</i>
<i>Kelly</i>	Solutions Workshop	<i>How to Develop and Choose Build vs. Buy Options</i>

3:45 PM: Networking Break

4:00 PM: CRXM: 360 Customer Centricity Use Cases - 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 Galotto (Markets Intelligence, SSGA) and Joe Stewart (Distribution Enablement & Analytics, GQG)*

9:00 AM: **The Last Mile of Insight Delivery: Bridging the Gap Between Data and Action**
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	<i>Strengths of CRMA, Tableau, and Power BI for Sales Enablement</i>
Segal	Marketing	<i>Keys to Successful Partnerships between Marketing & Distribution</i>
Kelly	Channel Evolution	<i>Aligning Capabilities for Evolving Channels</i>
Liv 4	Data, Tech & AI	<i>Navigating the values of CDPs, Data Lakes and MDMs</i>

11:15 AM: **Leveraging AI to Drive Sales** – *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:

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

2:30 PM: **Closing General Session – What Can We Apply Today – Strategy and Tactics**
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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