

1 – 1:50 p.m. ET

### CEO Welcome and Opening Remarks

#### SPEAKERS

**Wayne Chopus**, *President & CEO*, Insured Retirement Institute  
**Craig Pfeiffer**, *President & CEO*, Money Management Institute

### Storytelling from Outside of the Industry

Inclusive marketing starts with diversifying the voices that feed into your team's planning, and we are here to help. Get inspired by learning from the successes (and failures) of these out-of-industry powerhouses who have made demonstrable advancements in the area of inclusive marketing. Learn how they source new ideas, secure executive buy-in, and measure the business outcomes for new innovations. And walk away with different ways of thinking about inclusivity within the marketing space.

#### SPEAKERS

**Elissa Arkininstall**, *Partner*, PwC Experience Center  
**Jean Statler**, *Co-Founder & Managing Partner*, Statler Nagle LLC & *CEO*, Alliance For Lifetime Income (ALI)

#### MODERATOR

**Yogini Biswas**, *Chief Brand Officer*, Brighthouse Financial

1:50 – 2 p.m. ET

Break

2 - 2:50 p.m. ET

### Inclusive Market Research – An Industry Perspective

Your marketing shop relies on market research day-in and day-out to ensure you are reaching the right audiences with the right messages. Stale market research approaches could result in untapped consumers who are hungry for your organization's products or may miss the mark when it comes to pairing messages to populations, especially for underrepresented communities. Hear how companies are innovating their market research tactics to reach wide

audiences and grow market share.

#### SPEAKERS

**Marcia Dukes**, *Consulting Director for Diversity and Inclusion*, Prudential Financial  
**Tiffany Perkins-Munn**, Ph.D., *Managing Director*, BlackRock

#### MODERATOR

**Kathleen Zemaitis**, ACC, CPDC, *Chief Executive Officer*, Z Inclusion

2:50 – 3 p.m. ET

Break

3 – 4 p.m. ET

### Intersection of Marketing and Social Media

Social media has become one of the loudest megaphones companies can wield to create brand identity and connect with prospects and clients. With the growth and reliance on social media comes the challenge of deciding what campaigns to promote and support. The increased focus on diversity, equity, and inclusion across the industry brings new issues — social, political, and economic — to the forefront of public conversations. And corporate leaders may be expected to speak out by key stakeholders. This expert panel will discuss the decision-making process that goes into deciding what issues to take a position on and when to remain on the sidelines.

#### SPEAKERS

**Emily Pachuta**, *Chief Marketing & Analytics Officer*, Americas, Invesco  
**Arielle Patrick**, *Chief Communications Officer*, Ariel Investments  
**Paul Zettl**, *Senior Vice President, Head of Global Marketing, Chief Marketing Officer*, Cohen & Steers

#### MODERATOR

**April Rudin**, *Founder & CEO*, The Rudin Group

### CEO Closing Remarks

#### SPEAKERS

**Wayne Chopus**, *President & CEO*, Insured Retirement Institute  
**Craig Pfeiffer**, *President & CEO*, Money Management Institute

