

MMI 2021 ANNUAL CONFERENCE

SHAPING THE FUTURE TOGETHER

OCTOBER 20 - 28, 2021

#MMIANNUALCONFERENCE

Wednesday, October 20	Thursday, October 21	Friday, October 22	Monday, October 25	Tuesday, October 26	Wednesday, October 27	Thursday, October 28
General Sessions	Investment Solutions	Distribution	Tools & Technology	Leadership	Retirement	Distribution
1:00 – 1:15PM ET Welcome & Opening Remarks	11:00 – 11:50AM ET Democratization at Work: The Ins-and-Outs of Custom Portfolios	11:00 – 11:50AM ET Great Expectations: What Advisors Want from Distribution Teams	11:00 – 11:50AM ET Fintech Priorities: Do Enterprises and Advisors See Eye to Eye?	11:00 – 11:45AM ET Curbing Burnout: Your Guide to Prevention and Early Intervention	11:00 – 11:50AM ET “Financial Wellness”: The Definitive Guide	11:00 – 11:50AM ET Data’s Vital Role in Distribution Success
1:15 – 1:55PM ET Opening Keynote: Why the Retirement Wave Will Forever Alter Financial Services and Cause the Rise of Financial Planning 2.0	12:00 – 12:50PM ET Implementing ESG: Meeting Investor Objectives & Fiduciary Obligations	12:00 – 12:50PM ET Marketing Moves Center Stage	12:00 – 12:50PM ET The Evolution of the Customer Digital Experience	11:50AM – 12:00PM ET Quick Take: How is Trust Evolving in Business?	12:00 – 12:50PM ET Adoption, Engagement, Next Best Action, and Scale – Oh My!	12:00 – 12:50PM ET The Future of Distribution: Post-Pandemic and Beyond
2:00 – 2:30PM ET The Post-Pandemic Dynamics of Client Engagement	Leadership		Retirement	12:00 – 1:00PM ET Unleash Your Team’s Learning Capacity	Tools & Technology	General Sessions
2:35 – 3:15PM ET The Need for Speed: How M&A Dealmakers Are Reshaping Fintech	2:00 – 2:40PM ET The Future of Work: What it Means for You as a Leader		2:00 – 2:50PM ET Retirement Plans A-Z: An Industry Leadership Update	Investment Solutions	2:00 – 2:50PM ET Cybersecurity Risks and Challenges: What You Need to Know	1:00 – 1:30PM ET Passion, Discipline, and Balance: Lessons from an Olympic Icon
3:20 – 4:00PM ET Recharge Your Brain, Your Relationships, and Your Business	2:45 – 3:15PM ET Notice and Respond: Supporting Team Members		3:00 – 3:50PM ET Retirement Income Product Innovation: What’s Next?	2:00 – 2:50PM ET Outcome-based Solutions: Going Beyond Retirement Income	3:00 – 3:50PM ET Artificial Intelligence and Machine Learning: From Hype to Mainstream Adoption	1:35 – 2:10PM ET From Pledge to Progress: Taking Responsibility for Driving DE&I
	3:20 – 4:00PM ET The Future of Work: How to Lead and Innovate in the Speed of Now			3:00 – 3:50PM ET Opportunities in Non-correlated and Alternative Asset Classes		2:10 – 2:30PM ET Broadening Pathways to Investing: A Conversation with Kunal Kapoor
						2:30 – 3:05PM ET MMI Awards & President’s Report
						3:10 – 3:40PM ET Regulatory Outlook: What’s Ahead Under the Biden Administration?
						3:45 – 4:20PM ET Blockchain: The Future of Financial Services?