

2021 MMI

Women in Distribution SYMPOSIUM

VIRTUAL EVENT

JANUARY 21-22, 2021

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Executing a Vision for Success

Thursday, January 21

2:00 - 2:15pm ET

Welcome & Opening Remarks

Arlen Oransky, Senior Vice President, Chief Membership Officer, MMI

Conference Co-Chairs:

Karen Lutomski, Managing Director, Co-Head Private Wealth, U.S. Wealth Advisory Group, Nuveen

Anne Steer, Head of Distribution, Congress Asset Management

2:15 - 3:00pm ET

Personal Perspective: Drive & Strive

As chairman and CEO of Russell Investments, Michelle Seitz leads a global investment solutions firm with \$300 billion in assets under management and \$2.5 trillion in assets under advisement for clients in 32 countries around the world. In 2017, Michelle was recruited to Russell Investments to transform the firm in terms of growth and corporate culture. Over three years, she restructured the management team, revamped client offerings, and built sales and profitability while focusing the firm around its core purpose "to improve people's financial security." Hear first-hand what it takes to achieve success for your organization and advance your own career during these unprecedented times. During this candid conversation with Karen Lutomski, Michelle shares perspective on the industry and professional advice based on her personal experiences.

Michelle Seitz, Chairman and CEO, Russell Investments

Karen Lutomski, Managing Director, Co-Head Private Wealth, U.S. Wealth Advisory Group, Nuveen

3:05 - 3:50pm ET

How Stories Inform Financial Behavior and What to Do About It

As a behavioral economist, Sarah Newcomb has expertise in consumer psychology, economic decision-making, personal money management, and cognitive and social psychology. In short, she is an expert at understanding how individuals form opinions and make investment decisions. In this session, Sarah discusses her work and how knowing the history and stories of financial advisors and clients is integral to your success.

Sarah Newcomb, PhD, Director of Behavioral Science, Morningstar

3:55 - 4:40pm ET

Managing in Uncertain Times

One of the many challenges brought about by COVID-19 and the current WFH environment is how to keep a remote team motivated and functioning smoothly during a period of stress and uncertainty. This panel of experts will share what has worked, what hasn't, and how they are preparing their teams – and themselves – to successfully navigate the ups and downs of 2021.

Moderator:

Kim Carney, Senior Vice President, Division Manager, Central Division, Capital Group

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Panelists:

Erin Culek, Senior Vice President, Strategy and Business Development, Guardian Life

Heather Lord, Senior Vice President, Head of Strategy & Innovation, Capital Group

5:00 - 6:30pm ET

Cocktails and Catch-Up

Can we talk? We've all missed connecting at industry events over the past 10 months. Here's the next best thing! Grab your favorite beverage and snack, pick a festive background image, and join your friends and colleagues for a casual catch-up via Zoom. Nic Wallace, Sea Island Resort's award-winning Lead Bartender, will show us how to make some fun and unique cocktails – and then it's time to mix and mingle with your fellow attendees.

Friday, January 22

9:30 - 10:15am ET

Fireside Chat: Leading a Business in Challenging Times

2020 was certainly an eventful year for Jenny Johnson. She became chief executive of Franklin Templeton in February – the same month the fund company acquired Legg Mason, doubling its AUM. And we all know what happened in March. Anne Steer sits down with Jenny for a candid conversation on how she is leading her expanded team and business in these unprecedented times. Jenny will share personal perspective on how to be resilient and get ahead in this type of market and how, specifically, women can step up in this environment and stay relevant in the virtual world.

Jenny Johnson, President & CEO, Franklin Resources, Inc.

Anne Steer, Head of Distribution, Congress Asset Management

10:20 - 11:05am ET

“Agency” – and Why It is Critical Today

The times we live in are exceptional. Things move so fast that we all struggle to keep up. An excess of unhealthy mental stimuli and ever-increasing demands make it hard to adapt and create the lives we most want. When frequent feelings of being overwhelmed interrupt our capacity to learn and grow, we lose our ability to adapt – and our personal agency is diminished. *Agency is the ability to act as an effective agent for yourself* – it requires getting your mind, body, and emotions in balance to think clearly, advocate for yourself, and make choices that create positive things in your life. In this session, Dr. Anthony Rao and Dr. Paul Napper discuss their research on agency and their work with individuals and firms to deal with the significant demands we face professionally and personally.

Presenters:

Paul Napper, PsyD, Principal, Performance Psychology

Anthony Rao, PhD, Clinical Psychologist

11:10 - 11:55am ET

Mentorship and Sponsorship: Best Practices in a Virtual World

Staying connected in a virtual world has become increasingly challenging. Now more than ever, it is important that women build effective mentor and sponsor relationships to gain perspective, feel supported, and build their careers. In this session, we will address the difference between mentorship and sponsorship, the most impactful methods for mentoring/sponsoring others, and the innovative practice of reverse-mentorship.

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Moderator:

Alison Simpson, Senior Vice President, Head of Internal Sales, Delaware Funds by Macquarie

Panelists:

Kimberly Beck, Senior Vice President, Head of Wealth Marketing, Envestnet

Kayla Kennelly, Head of Financial Wellness, Facet Wealth

Suzanne Siracuse, CEO, Suzanne Siracuse Consulting Services

11:55 - 12:00pm ET

Closing Remarks

Arlen Oransky, Senior Vice President, Chief Membership Officer, MMI