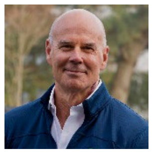
Money Management Institute **SUMMIT 2021**

Hallway Conversations

Wednesday, April 21 – Session 1

2:00 – 2:40PM ET

Social Mega Trends: Are Firms Paying Attention?



STEVE GRESHAM
CEO
The Execution Project

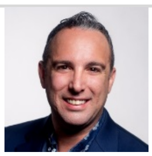
JEAN HEATH
Managing Director, Head of Asset Manager Network
Envestnet

Connecting the Dots: The Leap from UMA to UMH

ERIC LORDI
Managing Director
Morgan Stanley

JACK SHARRY
EVP,
Chief Marketing Officer
LifeYield

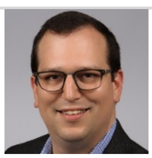
The Rise of Asset Allocation Models



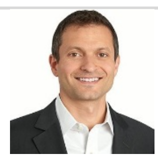
JASON KEPHART
Strategist, Multi-Asset and Alternatives Manager Research
Morningstar

BRENDAN POWERS
Associate Director,
Product Development
Cerulli Associates

Aligning Marketing & Sales to Drive Growth

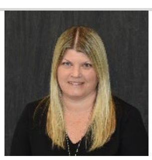


LEE KOWARSKI
VP, Head of Data Science and Distribution Solutions
SS&C | Research, Analytics and Consulting

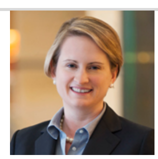


ERIK SCHNEBERGER
Chief Marketing Officer
American Century Investments

Under New Management: Retail Advice Regulation and the Biden Administration



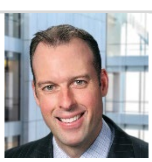
ALLISON BEVACQUA
SVP, Deputy Advisory Chief Compliance Officer
LPL Financial



LINDSAY JACKSON
Partner
Morgan, Lewis & Bockius

STEVE STONE
Partner
Morgan, Lewis & Bockius

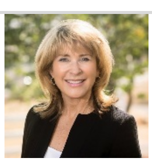
Trends in Distribution Team Compensation



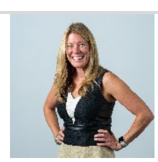
JIM DEVANEY
Head of U.S. Distribution
PGIM Investments

JOHN MONINGER
Managing Director,
Retail Sales
Eaton Vance

Accelerating the Return to Work Discussion: Dynamics for Employee Reintegration Post-Pandemic



KATHY FREEMAN GODFREY
President
Kathy Freeman Company



TARA HARKINS
VP, LFN Marketing
Lincoln Financial Network

Money Management Institute SUMMIT 2021

Hallway Conversations

Wednesday, April 21 – Session 2

2:45 – 3:25PM ET

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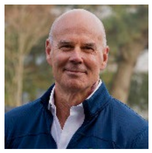

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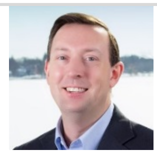
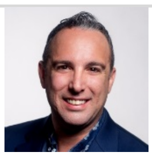
Connecting the Dots: The Leap from UMA to UMH

MIKE BETZ
Senior Manager,
Wealth Technology Strategist
F2 Strategy



MARK PEABODY
SVP, Product Management
Vestmark

The Rise of Asset Allocation Models



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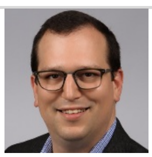

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SS&C | Research, Analytics and Consulting

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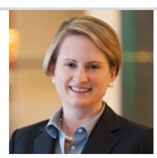
American Century Investments

Under New Management: Retail Advice Regulation and the Biden Administration

JESSICA HOWELL
AVP and Counsel
MFS Investment Management



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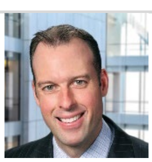

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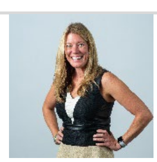


TARA HARKINS
VP, LFN Marketing
Lincoln Financial Network

Money Management Institute

SUMMIT 2021

Hallway Conversations

Thursday, April 22 – Session 1

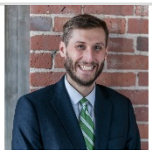
2:05 – 2:45PM ET

The Evolution of Distribution Models

JENNIFER ABATE
MD, Financial Institutions Group
Lazard Asset Management

JEFF CARLIN
Sr. MD, Global Head of Wealth Advisory Services
Nuveen

Data & Analytics: Making It Work



TIM KRESL
Principal, Distribution Insight
Broadridge

BRAD MOORE
Director of Product Management
BNY Mellon | Data and Analytics Solutions

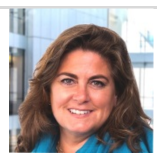
Talking Product: The Latest Advisory Developments

RANDY BULLARD
Global Head of Wealth
Charles River Development

AMY STERN
SVP,
Head of Advisory Programs
RBC Wealth Management

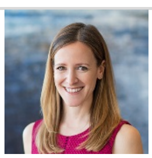
Integrating ESG Innovation into Your Business

LYNETTE JEFFERSON
Head of UBS Sustainable Investing Solutions
UBS Wealth Management

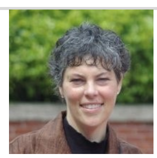


KIMBERLY LAPOINTE
EVP, Head of PGIM Investments International
PGIM Investments

Diversity & Inclusion in Action: Walking the Talk

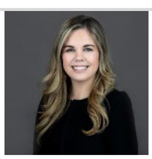


MIA FIORAVANTI
Exec. Director, CSR and Exec. Director of FS Foundation
FS Investments

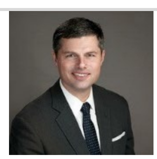


DIANE DEBONO SCHAFER
Chief Operating Officer and Chief Compliance Officer
Anchor Capital

The Advisor Team of the Future

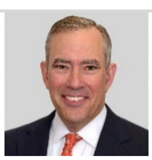


ALISON ROONEY
Executive Director,
Practice Strategy
Morgan Stanley

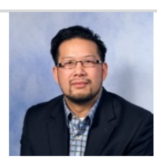


STERLING SHEA
Head of Practice Strategy
Morgan Stanley

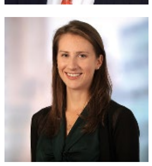
Driving Advisor Tech Adoption



PHIL BUCHANAN
Executive Chairman
Cannon Financial Institute



DAVID LO
Associate Partner,
Client Insight,
Human Capital Solutions
Aon



ADELE TAYLOR
Partner,
Financial Services Practice
McKinsey & Company

MONEY MANAGEMENT INSTITUTE SUMMIT 2021

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The Evolution of Distribution Models

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Lazard Asset Management

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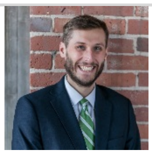
Data & Analytics: Making It Work



TIM KRESL
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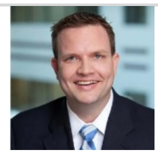

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Director of Product Management
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Global Head of Wealth
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NATHALIE WALLACE
Head of ESG Strategy and Development
Mirova | Natixis Investment Managers

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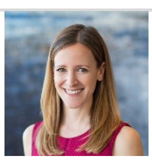

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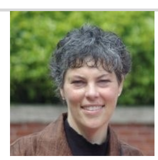

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Driving Advisor Tech Adoption

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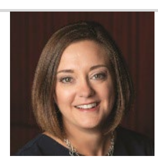

EMILY REITAN
Vice President
Distribution Fintech
Allianz Life Financial Services

ADELE TAYLOR
Partner,
Financial Services Practice
McKinsey & Company