

# Spring 2019 Forum

Conference Agenda  
Short Hills Hilton, NJ  
April 29 and 30, 2019



## Monday, April 29:

### The Pavilion – Conference Level

7:00am Enjoy some Yoga, join a running group, or find a partner for a round of Tennis

10:00 **Welcome, Kick-Off and Opening Remarks**  
Hazem Gamal, COO, The Forum

10:30 Presentation and Panel Discussion: recent **ROI of Intelligence** survey results  
Loren Fox - Ignites/MoneyMedia  
Suzanne Schwartz - SSGA  
Kevin Rosenfeld – AllianceBernstein  
Austin Lewis – Janus Henderson

12:00 **Fireside Chat about Platform Transitions** – Enlightened observations...  
Tom Bruno, Host and MC  
Jessica DeLeo - SSGA

12:30 **Networking Lunch** - Use this time to catch up and meet new people too!

### Salons A, B, and C – Conference Level

2:00 **Breakout Sessions:** Three of the same cross-topic sessions driven by members  
Check your name tag for your group assignment. No Vendor Partner participation.

2:30-3:30 Vendor Partner only meeting with Hazem Gamal in the Pavilion

### The Pavilion/Terrace – Conference Level

4:00 Update and discussion of **Minimum Universal Data Pack** efforts being made by the Forum  
Learn what the committees have accomplished, where we are now, and what's next  
Tony Busacca – The Forum

### Mendham/Madison/Terrace – Lobby Level

5:30 The evening will feature an **outdoor reception and dinner** for all participants and guests  
Enjoy New Jersey's freshest garden and artisanal goods  
We will continue the fun at The Retreat lounge and terrace afterwards

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## Tuesday, April 30:

### The Pavilion – Conference Level

6:30am Enjoy some yoga, join a running group, or find a partner for a round of Tennis

7:30 **Breakfast** - Use this time to catch up and meet new people too!

8:30 **Forum Vision and Outlook** – what is in store for the organization and its members  
Hazem Gamal, COO, The Forum

9:00 **Asset Management/Vendor Solution Showcase** – results from collaborations  
Scott Kasper, Ivy Funds  
Greg Piaseckyj, Salespage  
Aaron Courter, DST  
Shonda Jaquez, OppenheimerFunds  
David Cocks, Amundi/Pioneer  
Amanda Gallagher, NYLIM

### Salons A, B, and C – Conference Level

10:00 **Topic driven breakout sessions:**

Check your name tag for your group assignment. No Vendor Partner participation.

Group A: **Institutional/Wealth Management/RIA**

Group B: **Sales and Marketing Enablement**

Group C: **Data Management & Strategy**

### The Pavilion/Terrace – Conference Level

12:00 **Networking Lunch** -Use this time to catch up and meet new people too!

### Salons A, B, and C, The Pavilion – Conference Level

1:00 **Working breakout sessions** focused on learnings, next steps, and outcomes from The Forum  
In smaller breakout working groups. Includes Vendor Partners (in The Pavilion).

2:15 **Closing session** designed to share take-aways for action when we get back to our offices

### Salon A/Terrace – Conference Level

3:00 **Departing reception** will end the conference with a last chance for networking  
Coffee, Tea, Juices, Beer and Wine along with sweet and savory items