



225 Liberty Street | 12th Floor
Agenda as of September 12, 2018

8:30 AM – 9:00 AM

Registration and Networking Breakfast

9:00 AM – 9:15 AM

Opening Remarks and Program Overview

Co-Chairs:

Sheila (Bonitz) Stotler, Senior Vice President, Product Management, Brinker Capital

Adam Tabor, Vice President, Client Insights and Analytics, OppenheimerFunds

9:15 AM – 10:30 AM

Opening Keynote Presentation: ReFRAME to Build Authentic Communications

In this presentation, Ms. Meehan will present ReFRAME, a neuroscience-based approach that enables more mindful and effective communications. Her starting point is that organizations are constantly threatened by economic challenges, low sales, turnover, global competition, and organizational changes. During times of change and uncertainty, employees often feel threatened, which creates a sense of disengagement. To address these fears many leaders and change agents have learned the importance of repeatedly communicating to all, which is essential. But the big question is *how is the information that is communicated being framed?* Is the delivery of the communications creating a bigger threat response or are the leaders communicating in a way that the message can be safely received and positively activated upon? ReFRAME, a term that refers to how we “frame” important communications, provides a framework for creating engagement.

Kathy Meehan, Director and Executive Coach, ReThink Human Performance

10:30 AM – 11:00 AM

Networking Break

11:00 AM – 12:00 PM

Speed Round Discussions: Seizing the Day

This session is designed to help you establish new relationships and swap information and ideas. We have identified what might be classified as four industry “challenges.” The goal of this session is to look at them in a new light and reframe them as opportunities. Seminar participants will rotate from station to station to learn what others are doing or thinking around each topic.

Utilizing Technology for Productivity

Facilitator: Arvind Ramakrishnan, Executive Director, Morgan Stanley

Strategies to Advance Your Career

Facilitator: Gavin Dizon-Roosa, Product Manager, Foresters

The RIA Opportunity

Facilitator: Izaak Mendelson, Vice President, Director of Strategic Accounts, OppenheimerFunds

Navigating the Evolution of Advice

Facilitator: Rebecca Gray, Director, Investment Solutions Group, Merrill Lynch

12:00 PM – 1:00 PM

Networking Luncheon

1:00 PM – 2:00 PM

Panel Discussion: Demystifying Blockchain and Cryptocurrency

Moderator:

Paul Johnson, Adjunct Professor, Columbia University and Fordham University, Senior Advisor, Harbor Peak

Speakers:

Eamonn Maguire, Global Lead in Blockchain and Distributed Ledger Technology, KPMG US

Chirag Shah, Group Vice President, Publicis.Sapient

Charles Smith, Executive Director, Advisory Services, Ernst & Young LLP

2:00 PM – 3:00 PM

The Road Less Traveled: Non-Traditional Paths to Success

Three inspirational industry leaders will share their personal career journeys – their proudest achievements and biggest challenges, surprises and lessons along the way, what they wish they had known earlier in their careers, and why the conventional path is not always the smartest.

Moderator:

Sheila (Bonitz) Stotler, Senior Vice President, Product Management, Brinker Capital

Speakers:

Noreen Beaman, Chief Executive Officer, Brinker Capital

Cheryl Nash, President, Investment Services, Fiserv

Troy Thornton, Managing Director, Head of Retail Distribution, Goldman Sachs

3:00 PM – 3:15 PM

Networking Break

3:15 PM – 5:15 PM

Working Session: Design Thinking

Design Thinking – a human-centered, solutions-based approach to problem solving – has been adopted by some of the world's most prominent brands and is now being taught at leading universities around the world. This session will provide a tutorial on the phases of Design Thinking and why organizations are increasingly turning to this concept as a way to solve complex problems. Attendees will apply the principals of Design Thinking to brainstorm a common industry challenge and identify alternative strategies and creative solutions.

Speakers:

Kathryn Laventure, Senior User Experience Designer, EY

Nina Ali, Staff, Advisory Services, EY

Facilitators:

Arvind Ramakrishnan, Executive Director, Morgan Stanley

Adam Tabor, Vice President, Client Insights and Analytics, OppenheimerFunds

5:15 PM – 5:30 PM

Closing Remarks

Co-Chairs:

Sheila (Bonitz) Stotler, Senior Vice President, Product Management, Brinker Capital

Adam Tabor, Vice President, Client Insights and Analytics, OppenheimerFunds

5:30 PM

Networking Reception