

2018 MMI



Women in Distribution SYMPOSIUM

SEPTEMBER 12-13, 2018 ■ WESTIN O'HARE ■ CHICAGO, IL

September 12-13, 2018 | Westin O'Hare | Chicago, IL
Agenda as of September 6, 2018

*The Symposium is a gathering of female client-facing professionals designed to **inspire, empower and support** future women leaders in distribution.*

WEDNESDAY, SEPTEMBER 12, 2018

3:45 PM – 4:00 PM

Opening Remarks

Arlen Oransky, Executive Director, MMI Center for Distribution Excellence

Symposium Co-Chairs:

Karen Lutomski, Managing Director, Advisor Consultant, Private Wealth Advisory, Nuveen

Anne Steer, Head of Distribution, Congress Asset Management

4:00 PM – 5:00 PM

Why Women Don't Ask: Negotiation & The Gender Divide

Whether they want higher salaries, better career opportunities, or more help at home, women are much less likely than men to ask for what they want. When women do ask, they tend to mimic the forceful, competitive negotiating style favored by men, which often backfires. In this talk, Sara Laschever looks at why women feel reluctant to ask for what they need and deserve—and reveals the shockingly high price women—and their employers—pay when they don't take steps to combat this widespread phenomenon. A leading authority on the challenges that shape women's lives and careers, Ms. Laschever will explain how women can recognize more opportunities to negotiate, manage the anxiety they may feel when they approach an important negotiation, and employ negotiating strategies that have been shown to work especially well for women.

Keynote Speaker:

Sara Laschever, Author, Editor, Cultural Critic, and Coach

5:00 PM – 5:50 PM

Drive & Strive

In this candid discussion, senior women executives and financial advisors debate what it takes to succeed as a woman in financial services. They will share leadership lessons and practical advice on how women can define their own unique value proposition and take charge of their careers—and why it's so important to give back and empower others.

Moderator:

Arlen Oransky, Executive Director, MMI Center for Distribution Excellence

Panelists:

Margo Cook, President, Nuveen Advisory Services

Kimberly LaPointe, Executive Vice President, Head of Global Accounts, PGIM
Kathleen Roeser, Managing Director, Wealth Advisor, The Roeser Group at Morgan Stanley

5:50 PM – 6:30 PM

Networking and Cocktail Reception

Ready, set, go. It's time to work the room! Take advantage of this great group of successful women and make it a personal challenge to make at least five new connections. Introduce yourself ... share your story ... ask questions. We guarantee you'll find common ground, gather information and make new friends.

THURSDAY, SEPTEMBER 13, 2018

7:00 AM – 7:30AM

Breakfast

7:30 AM – 8:30 AM

Can We Talk? Tales from the Trenches

Hear from some of the industry's leading sales executives as members of the *MMI Women in Wholesaling Advisory Board* share their perspectives on the greatest opportunities and challenges they face in the advisory solutions industry. In a series of rapid-fire "Ted Talk"-style presentations, these inspiring women will share their personal career journeys—their proudest achievements and biggest challenges, surprises and lessons along the path, tips on attaining a healthy work-life balance, and what they wish they had known earlier in their careers.

Speakers:

MMI Women in Wholesaling Advisory Board

8:30 AM – 9:30 AM

Leveraging Your Time with Technology: Attention, Reacting, Multitasking, Task Switching, and Problem Solving

Between juggling professional, family and personal responsibilities—along with the limitation of there being only 24 hours in a day—time has become one of the most challenging assets to manage. Although technology can sometimes seem overwhelming, it can also be an incredible tool to help you manage your time and, ultimately, help you accomplish more each day. Whatever your stage of life or career trajectory, this presentation—with its focus on using technology, including mobile apps—will help improve your productivity and peace of mind both at home and at work. Hear straight from your industry colleagues about how they use technology to balance what matters most to them.

Moderator:

Rachel Jacobs, Divisional Director, Head of Strategic Relationship Management, Americas, Macquarie Group

Panelists:

Athena Ole, Head of Private Funds, Nasdaq Private Market

Melissa Roe, Sales Business Development Manager, Capital Group | American Funds

Jill Somerville, Vice President, Global Strategic Relations, Nuveen

9:30 AM – 10:30 AM

Presenting with Impact: Strategies for Effective Presentations

This session will provide a refresher on effective presentations, helping participants increase the clarity and power of their oral communication skills when presenting financial information and conclusions. Our experienced coaches will help you understand the two components of every message that are critical to influencing a decisionmaker to act on your recommendations – what you say and, more importantly, how you say it. Key topics include: the importance of treating every presentation as a conversation; how to captivate audiences and convince them to act on your recommendations; preparing a framework for every presentation; and delivering your message with confidence, clarity, and persuasiveness.

Speakers:

Norma Lana, Director, Lana Media Group

Jodi Daley, President, West End Productions

10:30 AM – 11:00 AM

Networking and Refreshment Break

11:00 AM – 12:00 PM

Plain Talk from Distribution Heads: Spotting and Coaching Exceptional Talent

Ever wonder what your manager is looking for? Want to know what qualities top salespeople consistently display? Do you need a sponsor to take your career to the next level? This panel of senior distribution leaders will share the traits and habits they observe in outstanding performers, how they coach them to get the most out of their talent, and what it takes to instill a high-performance mindset up and down the sales organization. These experts will also discuss the difference between a mentor and sponsor—and whether a sponsor can help navigate your next career steps and achieve greater success.

Moderator:

Karen Lutomski, Managing Director, Advisor Consultant, Private Wealth Advisory, Nuveen

Panelists:

Jeff Carlin, Senior Managing Director, Head of U.S. Retail, Nuveen

Anne Steer, Head of Distribution, Congress Asset Management

Brett Wright, Co-Head of Client Group, Macquarie Group

12:00 PM

Closing Remarks

Symposium Co-Chairs:

Karen Lutomski, Managing Director, Advisor Consultant, Private Wealth Advisory, Nuveen

Anne Steer, Head of Distribution, Congress Asset Management

12:00 PM – 12:45 PM

Networking Luncheon with MMI Distribution Leadership Forum Attendees

12:45 PM

Start of MMI Distribution Leadership Forum