2022 MMI Leadership Pathway Seminar

Agenda

December 7, 2022
BOSTON

#MMILeadershipPathway

Wednesday, December 7

8:30AM-9:00AM	Registration & Networking Breakfast
9:00AM-9:15AM	Welcome & Opening Remarks Conference Co-Chairs: Courtney Dunne, Vice President, Global Accounts, American Century Investments Jennifer Mancini, Manager, Advisory Consulting, Asset Management Services, Raymond James
9:15AM-10:00AM	Keynote Presentation: Leadership Principles from the Guide World and How they Apply to the Business World Hold on tight! This award-winning leader in learning design, globally experienced executive in financial services, recognized class V whitewater guide, and Host of The Leading Steep podcast will take you on a learning adventure in leadership principles that you'll never forget. Introduction: Ryan Logue, RMA®, Director, US Distribution Strategy and Planning, Franklin Templeton Barry Kruse, Vice President, Global Head, Franklin Templeton Academy
10:00AM-10:45AM	Keynote Breakout
10:45AM-11:00AM	Networking Break
11:00AM-11:45AM	A Futuristic Look at Asset and Wealth Management Industry Trends What's in store for the industry? Three of the industry's most well-known researchers will share their predictions from the product, advisor, and distribution perspectives on the big picture trends impacting both asset and wealth management. T. Neil Bathon, Managing Partner, FUSE Research Network Matthew Fronczke, Senior Director, SS&C Research, Analytics and Consulting, SS&C Technologies Bing Waldert, Managing Director, U.S. Research, Cerulli Associates
11:45AM-12:35PM	The Psychology behind Financial Decisions People are the fundamental units of capital markets, and our

ability to manage assets effectively is a function of our understanding of human behavior. In this interactive presentation, *New York Times* bestselling author Dr. Daniel Crosby will share a four-part process for understanding and managing behavioral risk as a route to improved investment decision-making.

Daniel Crosby, Ph.D., Chief Behavioral Officer, Orion Advisor Solutions

12:35PM-1:15PM Improving Executive Presence

You aspire to be an executive, but can you talk the talk and walk the walk? Learn tips and tricks from three of the industry's most respected leaders about the skills you should hone to improve your executive presence.

Moderator:
Amanda Robinson, Vice President, Portfolio Solutions, Fidelity Investments

Panelists:
Michelle Fuller, CIMA®, CETF®, Head of ETF and RIA Distribution, John Hancock Investment Management

Matthew Goulet, Head of Asset Manager Services and Business Development, Fidelity Investments

Daren Pippio, Senior Vice President, Advisory Strategy, Asset Management Services, Raymond James

1:15PM-2:00PM Networking Lunch

2:00PM-2:30PM Making the Most of Every Opportunity

There is no shortage of ways within the Leadership Pathway community – and the MMI community at large – to expand your professional network, deepen your industry knowledge, and advance your career. Learn about these different opportunities from the Chief Membership Officer at MMI and two high-achieving Leadership Pathway program alumni.

Moderator:
Arlen Oransky, Executive Vice President, Chief Membership Officer, Money Management Institute

Panelists:
Vadim Levin, Head of National Accounts, Congress Asset Management

Kyle Thompson, Senior Vice President, Business Development,

	Voya Investment Management
2:30PM-3:15PM	The Tech Connection: Creating a Cohesive Experience for Advisors and Investors How are big firms connecting their different apps and optimization software to offer a cohesive experience for advisors and investors? In this session, leading experts from the fintech world will break it all down for you. Moderator: Eileen Hayes, Vice President, Third Party Models Lead, Aladdin Wealth Tech, BlackRock Panelists: Jack Sharry, Executive Vice President, Chief Growth Officer, LifeYield Helen Yang, Founder and CEO, Andes Wealth Technologies
3:15PM-4:15PM	Role Breakout
4:15PM-5:00PM	Navigating Difficult Conversations as a Leader Are you nervous about having a tough conversation with an associate … or your whole team? You're not alone. Learn how best to handle these conversations from long-time industry leaders who have seen it all. Moderator: Boomer Saraga, Founder and Chief Executive Officer, Khelp Financial Panelists: Phil Casparius, Senior Managing Director and Head of Global Financial Institutions, Manulife and John Hancock Investment Management Anne Steer, Head of Distribution, Congress Asset Management
5:00PM-5:15PM	Closing Remarks Conference Co-Chairs: Courtney Dunne, Vice President, Global Accounts, American Century Investments Jennifer Mancini, Manager, Advisory Consulting, Asset Management Services, Raymond James
5:15PM-6:15PM	Networking Reception