



PRESENTS

TSAM **NEW YORK**

October 31, 2023

Metropolitan Pavilion
125 West 18th Street
New York, NY 10011



tsam.foxonmedia.com/newyork



Welcome to TSAM New York

Foxon Media is excited to once again bring the buy-side community together for TSAM New York, which will take place in the heart of Manhattan in October 2023.

TSAM is the definitive forum for leading asset managers and investment professionals from across the UK, Europe and North America, focused on shaping the future of the buy-side community.

The event agenda, researched and created by asset management leaders as well as the most innovative technology and solution providers from across the US, ensures that attendees leave with actionable insights and valuable commercial strategies to tackle the challenges that lie ahead.

With over 45 hours' worth of presentations, panel discussions, fire-side chats, and live tech demos, TSAM New York is an immersive and important learning experience for all front, middle and back-office professionals.

Attendees can access keynote sessions, networking events and drinks reception, as well as 5 focused content tracks:

- Regulation & Compliance
- Technology and Automation
- Investment Operations & Data
- Marketing and Client Services
- Performance & Risk



James Francis
Chairman & CEO
Paradigm Asset Management



Kelly Branco
Chief Compliance Officer
Tremblant Capital



Mei-Li da Silva Vint
Chief Compliance Officer
Brevet Capital



Rochelle Levy
Chief Compliance Officer,
Wealth Management
City National Bank



Craig Peretz
Chief Financial Officer
Golden Eagle Strategies LLC



Vib Arya
Chief Operating Officer
Shufro Rose



Reinaldo Ynchaustegui
Chief Technology Officer,
Managing Director
Marathon Asset Management LP



Evan Fire
Managing Principal,
Chief Operating Officer
Pzena Investment Management



Serge Todorovich
Chief Counsel, Office of Investor
Chief Compliance Officer
Shenkan Capital Management



Rebecca E. Brown
USA Director
Tobacco Free Portfolios



Alejandra Bacon
Head of Sales Enablement
& Data Management
Apollo Management



Lorenzo Cupido
Chief Investment
Risk Officer
Prudential Financial



Mark Robertson
GC & CCO
Eagle Capital Management



Milind Sharma
CEO
QuantZ Capital Management



Chris Chung
Chief Financial Officer
Bayview Advisors LLC



Atul Dalmia
Chief Analytics Officer
Morgan Stanley Wealth Management



David Teten
Founder
Versatile VC



Daria Muresan
SVP, Treasury COO Office,
Strategy & Transformation
Citi



Owen Donley III
Chief Counsel, Office of Investor
Education and Advocacy
U.S. Securities & Exchange Commission



Arthur Melkonian
Chief Operating Officer
Equinox Partners



Niral Kalaria
Chief Ethics Officer
DWS Group



Vijay Kasarabada
Chief Information Officer
Nuveen



Michael Korby
Head of Data Strategy, FICC
Balyasny Asset Management



Yovanka Bylander
Head of Sustainability
TimesSquare Capital Management, LLC



Paul Zajac
Global Head of
Investments Technology
Invesco US



Animesh Verma
Director of Investment Risk
Franklin Templeton



Keri Tusa
Director - Global Head of
Investment Technology
Lazard Asset Management



Neil Margolis
General Counsel
Tilden Park Capital Management



Hitesh Patel
Global Head of
Enterprise Risk
Invesco Ltd.



Rajiv Ohri
Transformation and
Change Leader
Independent Consultant



Daniel Ellen
Director, Global Compliance
Franklin Templeton



Brendan Kalb
Global General Counsel
ExodusPoint Capital Management



Cinda Whitten
Senior Managing
Director, Head of Global
Investment Operations
Nuveen



Christopher Link
Global Head of Content
Marketing
Manulife Investment Management



Eric Smith
Head of Investment
Operations
Cascade Asset Management Company



Elizabeth Coleman-Chen
Global Head of Alternatives
Product and Channel
Marketing - Executive Director
Morgan Stanley



Scott Brennan
Managing Director,
Head of Marketing Services
& Brand
First Eagle Investments



Adam Newmark
Managing Director,
Head of Enterprise Risk
Americas, Wellington Management



Juanita Jeffrey
Director, Head of
Institutional Marketing
New York Life Investments



Shankar Venkatraman
VP, Head of Performance
& Reporting
American Century Investment Management



Courtney Garcia
Head of Investment Risk
Apollo Global Management



Ellen Lawrence
VP, Global Head of
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PGIM Investments



Iro Tsatsiomi
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Data Science, Principal
Data Scientist
T. Rowe Price



Max Yu
SVP, Strategist and
Senior Risk Manager,
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Head of Marketing,
Client Reporting and Digital
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Brown Brothers Harriman



Daniel Gulko
Head of Performance
Measurement and Client
Reporting
HSBC Global Asset Management (USA)



Patricia Pina
Head of Product
Research & Innovation
Clarity AI



Lauren Ferrara
Head of USI, RPS Sales
Capabilities, Vice President -
Global Sales Management
T. Rowe Price



Mark Egert
Director of Compliance and
Managing Director
Brevet Capital



Russell Newman
Managing Director
Great Lakes Advisors



Ken Burd
Managing Director - Digital
Enablement & Analytics
Principal Asset Management



Jane Conway
Managing Director,
Head of Digital, Data and
Enablement-Client
& Product Solutions
Apollo Global Management Inc.



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CFA, FRM, Managing Director,
Investment Risk
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Leor Sillman
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TD Epoch



Peter Russell
Managing Director,
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and Monitoring
PSP Investments



Jon Ambos
Head of Investment
Operations
Prosperity Asset Management



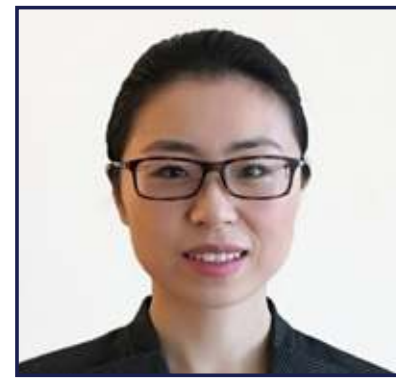
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Janus Henderson Investors U.S.



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Longfellow Investment Management



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Mahesh Narayan
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Ronald Ratcliffe
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Joe LaFemina
Director, Solutions
Management, Managed
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Head of Product
(Asset Management)
ION Markets



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Lamar Associates



Richard Over
Founding Partner
Liqueo



Anthony Russo
Senior Director,
Product Marketing
Seismic



Christopher Farrell
Head of US and Global
Head of Strategy
Finbourne Technology



Neil Thornburn
Chief Experience Officer
Kurtosys



Anneliese Thomas
Head of Marketing
Kurtosys



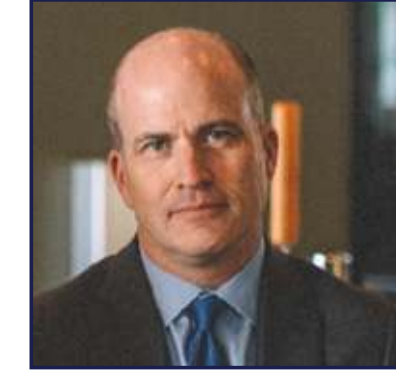
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Strategic Business Development
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Gresham Technologies



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Senior Strategy Principal
SimCorp



Eugene Kim
Director, Client Solutions
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Jeff Marsden
Chief Product Officer
PureFacts



Kieran Gallagher
Executive Director,
EDM Product
S&P Global Market Intelligence



Samantha Gibson
Head of Product for
EDM & Platform Services
SP Global Market Intelligence



Thierry Zuppinger
Chief Operating Officer
PureFacts



Vasagi Kothandapani
SVP Strategic
Accounts & TrainAI
RWS Group



Diwakar Goel
Global Head of Data
Platform and Solutions
BlackRock



Chris Napoli
Head of Wealth
& Asset Management
Snowflake



Brian Licata
Managing Director,
Global Head of Clients
Aladdin, BlackRock



Peter Ciecka
Unit Chief, Treasury
Risk Management
Inter-American Development Bank (IADB)

8:00AM - Registration

8:30AM - 9:00AM - Saifr Hosted Roundtable Discussions
Regulatory Roundup and AI concerns

8:30AM - 9:00AM - Gresham Technologies Hosted Roundtable Discussions
Mastering the Data Maze: Strategies and Challenges in the Modern Landscape

8:30AM - 9:00AM - Appian Hosted Roundtable Discussions
Risk mitigation through technology: How data fabric and AI can help with governance, risk and compliance

8:30AM - 9:00AM - Kurtosys Hosted Roundtable Discussions
The future of client reporting

8:50AM - Chair's Opening Remarks

9:00AM - Opening Keynote
Who Will Disrupt Investment Management, and How?
Keynote Speaker: **David Teten**, Founder, **Versatile VC**

9:30AM - Second Keynote
This New Era of Pragmatism for Asset Management
Keynote Speakers: **Brian Licata**, Managing Director, Global Head of Clients, **Aladdin**, **BlackRock**
Diwakar Goel, Global Head of Data Platform and Solutions, **BlackRock**.

10:00AM - Morning Networking Break

Investment Operations & Data <i>Stream A</i>	Regulation & Compliance <i>Stream B</i>	Technology & Automation <i>Stream C</i>	Performance & Risk <i>Stream D</i>	Marketing & Client Services <i>Stream E</i>
<p>Chair's Welcome Address</p> <p>Arthur Melkonian, Chief Operating Officer, Equinox Partners</p>	<p>Chair's Welcome Address</p> <p>Milind Sharma, CEO, QuantZ Capital Management</p>	<p>Chair's Welcome Address</p> <p>Mike Kendall, Director of Global Product Strategy, Institutional & Investment Management, SS&C Technologies, Inc.</p>	<p>Chair's Welcome Address</p> <p>Kenneth Lamar, Principal Partner, Lamar Associates</p>	<p>Chair's Welcome Address</p> <p>Neil Thornburn, Chief Experience Officer, Kurtosys</p>
<p>10:45AM - 11:30AM Panel Discussion: Reshaping the blueprint of outsourcing - How is operational transformation paving the way for new investment decisions? Speakers: Craig Peretz, Chief Financial Officer, Golden Eagle Strategies Chris Chung, Chief Financial Officer, Bayview Advisors LLC Joe LaFemina, Director, Solutions Management, Managed Services, SS&C Technologies, Inc. Rajiv Ohri, Transformation and Change Leader, Independent Consultant</p>	<p>10:45AM - 11:30AM Panel Discussion: Tackling emerging regulatory changes - Achieving industry harmonisation for the proposed SEC rules on swing pricing Speakers: Brendan Kalb, Global General Counsel, ExodusPoint Capital Management Neil Margolies, General Counsel, Tilden Park Capital Management</p>	<p>10:45AM - 11:30AM Panel Discussion: Delivering technological innovation - How can you maximize your ROI and drive value creation? Speakers: John Trapani, Industry Leader, Financial Services, Appian Christopher Farrell, Head of US and Global Head of Strategy, Finbourne Technology Vijay Kasarabada, Chief Information Officer, Nuveen Paul Zajac, Global Head of Investment Technology, Invesco US</p>	<p>10:45AM - 11:40AM Panel Discussion: SVB risk oversight - What are the lessons learnt and how can the industry prevent future disruptions to the market? Speakers: Derek Jun, Managing Director, Investment Risk, Nuveen, a TIAA Company Daria Muresan, SVP, Treasury COO Office: Strategy & Transformation, Citi Peter Ciecka, Unit Chief, Treasury Risk Management, Inter-American Development Bank (IADB)</p>	<p>10:45AM - 11:30AM Panel Discussion: Mastering the art of distribution - What platforms can enable product diversification and help you stand out? Speakers: Leor Sillman, Managing Director, Marketing, TD Epoch Lauren Ferrara, Head of US/RPS Sales Capabilities, Vice President - Global Sales Management, T. Rowe Price</p>
<p>11:30AM - 12:00PM Presentation: Achieving a Consolidated View Across Public and Private Assets: ID Enrichment, Cross-Reference Data and Entity Mastering Speaker: Kieran Gallagher, Executive Director, EDM Product Management, S&P Global Market Intelligence</p>	<p>11:30AM - 12:00PM Sponsor Presentation</p>	<p>11:30AM - 12:00PM Panel Discussion: Automation in Customer Lifecycle Management: The Key to Achieving a 360-Degree View of Customer Experiences Speakers: Doug Shum, Director, Financial Services Solutions, Appian Abdul Mohamed, National Intelligent Automation Leader, RSM</p>	<p>11:40AM - 12:30PM Panel Discussion: Building an end-to-end risk governance framework - How do you determine ownership and stewardship in your organization? Speakers: Hitesh Patel, Global Head of Enterprise Risk, Invesco Ltd. Niral Kalaria, Chief Ethics Officer, DWS Group Adam Newmark, Managing Director, Head of Enterprise Risk, Americas, Wellington Management Lorenzo Cupido, Chief Investment Risk Officer, Prudential Financial</p>	<p>11:30AM - 12:00PM Presentation: Client Revenue Life Cycle Speaker: Jeff Marsden, Chief Product Officer, PureFacts</p>
<p>12:00PM - 12:30PM Fireside Chat: Unlocking the promise of the core platform - Can you truly achieve it? Speakers: Ed Kuczma, Senior Strategy Principal, SimCorp Chris Napoli, Head of Wealth & Asset Management, Snowflake</p>	<p>12:00PM - 12:30PM Fireside Chat: Evolving regulations - How cross-border regulations are redefining the US asset management space?</p>	<p>12:00PM - 12:30PM Fireside Chat: Presentation: Simplifying Quarter-End Content Production: How Technology Automates & Streamlines Speaker: Anthony Russo, Senior Director, Product Marketing, Seismic</p>	<p>12:00PM - 12:30PM Fireside Chat: Analytics driven sales and marketing - Creating a data flow that can enable your teams to reach a broader target audience Speakers: Ken Burd, Managing Director - Digital Enablement & Analytics, Principal Global Investors Ellen Lawrence, VP, Global Head of Marketing Services, PGIM Investments</p>	

12:30PM - Lunch Break

<p>1:50PM - 2:35PM Panel Discussion: Data accessibility and readiness - Tools that enable methodical business strategies and prompt decision-making Speakers: Vib Arya, Chief Operating Officer, Shufro Rose Russell Newman, Managing Director, Great Lakes Advisors Shankar Venkatraman, VP, Head of Performance & Reporting, American Century Investment Management Mahesh Narayan, Institutional Asset Management Segment Head, Arcesium</p>	<p>1:50PM - 2:35PM Panel Discussion: Compliant communication - Tackling the hurdles of the SEC's new recordkeeping requirements and staying on track for delivery Speakers: Kelly Branco, Chief Compliance Officer, Tremblant Capital Daniel Ellen, Director, Global Compliance, Franklin Templeton Mark Egert, Director of Compliance and Managing Director, Brevet Capital</p>	<p>1:50PM - 2:35PM Panel Discussion: Thriving in the era of automation - Integrating generative AI, AI and ML into business processes to help in the quest for alpha Speakers: Vall Herard, Co-Founder and CEO, Saifr James Francis, Chairman & CEO, Paradigm Asset Management Reinaldo Ynchaustegui, Chief Technology Officer, Managing Director, Marathon Asset Management LP Cinda Whitten, Senior Managing Director, Head of Global Investment Operations, Nuveen</p>	<p>1:50PM - 2:35PM Panel Discussion: Multi asset portfolio analytics - Improving risk management through methodical diversification Speakers: Ronald Ratcliffe, Managing Director, BlackRock Animesh Verma, Director of Investment Risk, Franklin Templeton Max Yu, SVP, Strategist and Senior Risk Manager, Global Multi-Asset Solutions, T. Rowe Price Courtney Garcia, Head of Investment Risk, Apollo Global Management</p>	<p>1:50PM - 2:35PM Panel Discussion: Embracing the age of purpose-driven branding - Shaping client journey and driving better performance through authenticity Moderator: Anneliese Thomas, Head of Marketing, Kurtosys Speakers: Neil Thornburn, Chief Experience Officer, Kurtosys Patrice Trichon, Head of Marketing, Client Reporting and Digital in Investment Management, Brown Brothers Harriman Scott Brennan, Managing Director, Head of Marketing Services & Brand, First Eagle Investments</p>
<p>2:35PM - 3:00PM Fireside Chat: Accelerating growth through data-driven tech - How can you reduce the cost of operations and increase margins? Speakers: Jon Ambros, Head of Investment Operations, Prosperity Asset Management Peter Russell, Managing Director, Operations, Administration and Monitoring, PSP Investments</p>	<p>2:35PM - 3:00PM Fireside Chat: The SEC's Climate Risk Disclosure - Standardizing reporting under scope 3 and providing comparable and consistent data Speakers: Jamison (Jamie) Friedland, Sustainability Analyst, AXA Investment Managers Patricia Pina, Head of Product Research & Innovation, Clarity AI</p>	<p>2:35PM - 3:00PM Fireside Chat: Building Trust: How asset managers can protect client data and enhance investor protection Speakers: Alejandra Bacon, Head of Sales Enablement & Data Management, Apollo Management Jay Amalraj, Chief Technology Officer, Harris Associates</p>	<p>2:35PM - 3:00PM Presentation: The new science of objective asset allocation - Exploiting risk information from option prices Speaker: Philip Maymin, Director of Asset Allocation Strategies, Janus Henderson Investors U.S.</p>	<p>2:35PM - 3:00PM Fireside Chat: Revamping customer experience - Paving the way to superior client interaction through AI and digitization Moderator: Neil Thornburn, Chief Experience Officer, Kurtosys Speakers: Jane Conway, Managing Director, Head of Digital, Data and Enablement-Client & Product Solutions, Apollo Global Management Inc Vasagi Kothandapani, SVP Strategic Accounts & TrainAI, RWS Group Atul Dalmia, Chief Analytics Officer, Morgan Stanley Wealth Management</p>

3:00PM - Afternoon Networking Break

<p>3:30PM - 4:15PM Panel Discussion: A holistic approach to operational transformation - Achieving scalability through data-driven cross functional collaboration Moderator: Samantha Gibson, Head of Product for EDM & Platform Services, S&P Global Market Intelligence Speakers: Evan Fire, Managing Principal, Chief Operating Officer, Pzena Investment Management Eric Smith, Head of Investment Operations, Cascade Asset Management Company Michael Korby, Head of Data Strategy, FICC, Balyasny Asset Management</p>	<p>3:30PM - 4:15PM Panel Discussion: Managing the cost of compliance - Building reporting efficiency through technology, automation and analytics Speakers: Serge Todorovich, General Counsel and Chief Compliance Officer, Shenkman Capital Management Rochelle Levy, Chief Compliance Officer, Wealth Management, City National Bank Steven Strange, Head of Product (Asset Management), ION Markets Mark Robertson, GC / CCO, Eagle Capital Management</p>	<p>3:30PM - 4:15PM Panel Discussion: Overcoming the business-tech divide through transformation - Using interconnected systems to your advantage Speakers: Keri Tusa, Director - Global Head of Investment Technology, Lazard Asset Management Daria Muresan, SVP, Treasury COO Office: Strategy & Transformation, Citi Thierry Zuppinger, Chief Operating Officer, PureFacts Richard Over, Founding Director, Liqueo Eugene Kim, Director, Client Solutions, FactSet</p>	<p>3:30PM - 4:15PM Fireside Chat: Minimizing the impact of market volatility - Practical approaches to managing your investment performance in an increasing interest rate environment Speakers: Daniel Gulko, Head of Performance Measurement and Client Reporting, HSBC Global Asset Management (USA) Lei Liu, Director of Equity Investments and Portfolio Manager of Global Equities, PanAgora</p>	<p>3:30PM - 4:15PM Panel Discussion: The power of connectivity - How is social media transforming marketing and driving client engagement? Moderator: Anneliese Thomas, Head of Marketing, Kurtosys Speakers: Juanita Jeffrey, Director, Head of Institutional Marketing, New York Life Investments Elizabeth Coleman-Chen, Global Head of Alternatives Product and Channel Marketing - Executive Director, Morgan Stanley Investment Management Owen Donley III, Chief Counsel, Office of Investor Education and Advocacy, U.S. Securities & Exchange Commission</p>
<p>4:15PM - 4:40PM Fireside Chat: How can advancements in data science support investment decisions and volatility monitoring? Speakers: Iro Tasitsiomi, Head of Investments Data Science, Principal Data Scientist, T. Rowe Price</p>	<p>4:15PM - 4:40PM Fireside Chat: Enabling a seamless transition to T+1 - What are the market factors and obstacles standing in the way of complying by May 2024? Speakers: Russell Newman, Managing Director, Great Lakes Advisors Christian Mendonça, Strategic Business Development Manager, North America Product Manager, Control for Buy-Side Settlements, Gresham Technologies</p>	<p>4:15PM - 4:40PM Presentation: Leverage NLP to extract insights from financial text sources Speaker: Yuyu Fan, Senior Data Scientist (VP), AllianceBernstein</p>	<p>4:15PM - 4:40PM Fireside Chat: Rise of ESG data and analytics - How sustainable investing improves risk-adjusted performance Speakers: Yovanka Bylander, Head of Sustainability, TimesSquare Capital Management LLC Rebecca E. Brown, USA Director, Tobacco Free Portfolios</p>	<p>4:15PM - 4:40PM Presentation: Building and valuing your content marketing organization Speaker: Christopher Link, Global Head of Content Marketing, Manulife Investment Management</p>

4:40PM - Networking Drinks



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October 31, 2023** [Limited availability]

**Buy-side professionals qualify for
a complimentary pass to attend all
sessions at TSAM New York 2023.**

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