



PRESENTS

TSAM BOSTON



April 4th, 2024

Hyatt Regency Boston

1 Ave de Lafayette, Boston, MA 02111, United State

tsam.foxonmedia.com/boston

Welcome to TSAM Boston

Foxon Media is excited to once again bring the buy-side investment community together for TSAM Boston in April 2024.

The Summit for Asset Management (TSAM) is the definitive forum for leading asset managers and investment professionals from across the globe, with the long-established Boston edition offering East Coast based executives a chance to exchange knowledge and connect with likeminded peers from the region.

The agenda has been curated alongside asset management leaders as well as the top technology and solution providers to ensure that attendees hear the latest content and leave the event well-equipped to drive their investment operations and business needs.

With three tracks of content covering the full breadth of middle and back office operations, the one-day summit will provide a host of presentations, panel discussions, fireside chats, one-to-one meetings, and a stimulating networking experience.

We look forward to reconnecting with you at TSAM Boston in 2024.

TSAM Boston addresses the hottest topics in the industry, including:

- Data & Technology
- Performance & Risk
- Investment Operations
- Marketing & Client Services

Speakers



Michael Woodall
Chief of Operations
Putnam Investments



Mike Guarasci
Chief Operating Officer
Polen Capital



Michael Germano
Global Chief Operating Officer
Newton Investment Management Group



Tarun Sood
Chief Data Officer
American Century Investments



Sarah Chapman
Chief Marketing Officer, Manulife
Investment Management Global
Chief Sustainability Officer
Manulife



Brian Fruh
Chief Information Officer,
Global Head of Technology
Impax Asset Management



Lenka Martinek
Managing Partner
Nordis Capital



Dominica Ribeiro
Chief Marketing and
Distribution Officer
Breckinridge Capital Advisors



John Plansky
Head of State Street Alpha
State Street



Gabriel Keiji Altbach
Chief Marketing Officer
Voya Investment Management



Nick Elward
SVP, Head of Institutional
Product and ETFs
Natixis Investment Managers



Jennifer J. Pearson
Chief Human Resources Officer
& Employment Counsel
Deerfield Management



Dan McElwee
Partner and Chief
Operating Officer
Ventura Wealth Management



Daniel J. Braz
Vice President, Head of
ETF Investment Strategy,
SPDR ETFs
State Street Global Advisors



Rebecca White
Global ESG Integration Lead
Newton Investment Management



Mike Meriton
Co-Founder
EDM Council



Nicholas Sambuco
U.S. Head of Multi-Asset Investment
Consultancy & Oversight
Columbia Threadneedle Investments



Sabrina Carlson
General Counsel
First Eagle Alternative Credit



Kevin Papadopoulos
Principal Director of
Technology & CISO
Longfellow Investment Management



Jay Krish
Head of AML-FCC
Data Governance
State Street



Eric Smith
Head of Investment
Operations and Co-Chair,
Operations Committee
Cascade Asset Management Company



Grace Kang
Head of Investment
Operations
Boston Partners Global Investors



Amit Deshpande
Head of Quantitative
Investments & Research
T Rowe Price



Yovanka Bylander
Head of Sustainability
TimesSquare Capital Management, LLC



Jay Leopold
Head, N.A. Investment
Risk Management
Columbia Threadneedle Investments



Zhang Zhang
Investment Analytics &
Data Science Director
Polen Capital Management



Michael Koegler
Managing Principal
and Founder
Market Alpha Advisors



Leslie Samuelrich
President
Green Century Funds



Daryl Bradford
Senior Vice President Director
Performance & Attribution
Acadian Asset Management



Matt Schortmann
Vice President Head of
Institutional Product & Strategy
Columbia Threadneedle Investments US



Michael Snow
Head of Investment
Technology
Loomis Sayles & Company



Joel M. Roberts
Founder & CEO
Brescor Wealth Advisory



Lei Liu
Director of Equity
Investments and Portfolio
Manager of Global Equities
PanAgora



Rachel Dorris
Director, Distribution
Enablement and Analytics
Principal Asset Management



Durai Rajamanickam
AVP Data
Voya Financial



Antonio Ferreira
VP Sr. Director, Global
Marketing & Digital Strategy
MFS Investment Management



George Mylnikov
Portfolio Manager, Head
of Quantitative Research
Windhaven Investment Management



Kieran Gallagher
EDM Product Management
S&P Global Market Intelligence



Melanie Peterson
Program Director
TrainAI, RWS



Michael Quigley
Executive Vice President -
Global Head of Distribution
Fiera Capital



Clare Reed
Independent, Former
Director, Marketing
Operations, Optimization
and Governance Lead



Kelly Finneran
Head of Digital Marketing
Automation
John Hancock



Nick Stanojev
Senior Advisor
Chestnut Advisory Group



Sarva Srinivasan
Chief Executive Officer
EZOPS



Andrew Manickas
VP, Director,
Managed Services
FactSet



Anne Steer
Head of Distribution
Congress Asset Management



Roelfien Kuijpers
Global ESG Client Officer
DWS

Agenda

8:00 AM - 9:00 AM Registration

9:10 AM Opening Remarks

9:15 AM - 9:45 AM Opening Keynote

AI versus Gen AI – Busting the myths around emerging forms of how advance intelligence tools are transforming the investment industry
Speaker: Mike Meriton, Co-Founder, *EDM Council*

9:45 AM - 10:15 AM Second Keynote

The Asset Manager of the Future: With industry consolidation accelerating, increasing demand for personalized products, and expansion into private assets; how should firms approach their future-state target operating model?
Speaker: John Plansky, Head of State Street Alpha, *State Street*

10:15 AM - 11:00 AM Morning Networking Break

Investment Operations & Data <i>Stream A</i>	Technology & Automation <i>Stream B</i>	Marketing & Client Services <i>Stream C</i>
<p> Chair's Welcome Address</p> <p>Joel M. Roberts, Founder & CEO, <i>Brescor Wealth Advisory</i></p>	<p> Chair's Welcome Address</p> <p>Michael Koegler, Managing Principal and Founder, <i>Market Alpha Advisors</i></p>	<p> Chair's Welcome Address</p> <p>Clare Reed, Independent, Former Director, Marketing Operations, Optimization and Governance Lead</p>
<p>11:00 AM - 11:45 AM - Panel Discussion</p> <p>Building an integrated network of expertise - Maintaining oversight and monitoring while outsourcing</p> <p>Speakers:</p> <p>Kieran Gallagher, EDM Product Management, <i>S&P Global Market Intelligence</i></p> <p>Michael Germano, Global Chief Operating Officer, <i>Newton Investment Management Group</i></p> <p>Andrew Manickas, VP, Director, Managed Services, <i>FactSet</i></p> <p>Grace Kang, Head of Investment Operations, <i>Boston Partners Global Investors</i></p>	<p>11:00 AM - 11:45 AM - Panel Discussion</p> <p>Scaling and automating operational workflows – Navigating tech trends around AI and digital transformation</p> <p>Speakers:</p> <p>Brian Fruh, Chief Information Officer, Global Head of Technology, <i>Impax Asset Management</i></p> <p>Melanie Peterson, Program Director, <i>TrainAI, RWS</i></p> <p>Sarva Srinivasan, Chief Executive Officer, <i>EZOPS</i></p>	<p>11:00 AM - 11:45 AM - Panel Discussion</p> <p>Balancing investor expectations and product development strategies - Leading the innovation race in design thinking</p> <p>Speakers:</p> <p>Matt Schortmann, Vice President Head of Institutional Product & Strategy, <i>Columbia Threadneedle Investments US</i></p> <p>Sabrina Carlson, General Counsel, <i>First Eagle Alternative Credit</i></p> <p>Daniel J. Braz, Vice President, Head of ETF Investment Strategy, SPDR ETFs, <i>State Street Global Advisors</i></p> <p>Michael Quigley, Executive Vice President - Global Head of Distribution, <i>Fiera Capital</i></p>
<p>11:45 PM - 12:15 PM - Fireside Chat</p> <p>Multidimensional operational models - Achieving interconnectedness and consolidation</p> <p>Speaker:</p> <p>Michael Woodall, Chief of Operations, <i>Putnam Investments</i></p>	<p>11:45 PM - 12:15 PM - Presentation</p> <p>Breaking the chain of Bias: Using Data Contracts to mitigate bias in AI models</p> <p>Speaker:</p> <p>Jay Krish, Head of AML/FCC Data Governance, <i>State Street</i></p>	<p>11:45 PM - 12:15 PM - Panel Discussion</p> <p>Stepping into the minefield of ESG and Net Zero – How can we prevent greenwashing through consistent messaging and transparency in product marketing and distribution?</p> <p>Speakers:</p> <p>Sarah Chapman, Chief Marketing Officer, Manulife Investment Management Global Chief Sustainability Officer, <i>Manulife</i></p> <p>Leslie Samuelrich, President, <i>Green Century Funds</i></p> <p>Roelfien Kuijpers, Global ESG Client Officer, <i>DWS</i></p>

12:15 PM - 1:45 PM Lunch Break

<p>1:45 PM - 2:30 PM - Panel Discussion</p> <p>Navigating the transformation journey - Strategies to determine ownership and stewardship in your organization</p> <p>Speakers:</p> <p>Eric Smith, Head of Investment Operations, <i>Cascade Asset Management Company</i></p> <p>Dan McElwee, Partner and Chief Operating Officer, <i>Ventura Wealth Management</i></p> <p>Rebecca White, Global ESG Integration Lead, <i>Newton Investment Management Group</i></p>	<p>Strategy & Performance <i>Stream B</i></p> <p>1:45 PM - 2:30 PM - Panel Discussion</p> <p>Optimizing asset allocations performance – Maintaining portfolio resilience against market swings and geopolitical risks</p> <p>Speakers:</p> <p>Amit Deshpande, Head of Quantitative Investments & Research, <i>T Rowe Price</i></p> <p>George Mylnikov, Portfolio Manager, Head of Quantitative Research, <i>Windhaven Investment Management</i></p> <p>Michael Snow, Head of Investment Technology , <i>Loomis Sayles & Company</i></p> <p>Lenka Martinek, Managing Partner, <i>Nordis Capital</i></p>	<p>1:45 PM - 2:30 PM - Panel Discussion</p> <p>Asset management in the social era - How data analytics and insights are reshaping customer relationship management</p> <p>Moderator:</p> <p>Nick Stanojev, Senior Advisor, <i>Chestnut Advisory Group</i></p> <p>Speakers:</p> <p>Dominica Ribeiro, Chief Marketing and Distribution Officer, <i>Breckinridge Capital Advisors</i></p> <p>Michael Quigley, Executive Vice President - Global Head of Distribution, <i>Fiera Capital</i></p> <p>Clare Reed, Independent, Former Director, Marketing Operations, Optimization and Governance Lead</p>
<p>2:30 PM - 3:00 PM - Fireside Chat</p> <p>Redefining your data accessibility and security strategy - Scrutinizing in-house data management and third-party due diligence</p> <p>Moderator:</p> <p>Michael Koegler, Managing Principal and Founder, <i>Market Alpha Advisors</i></p> <p>Speakers:</p> <p>Kevin Papadopoulos, Principal, Director of Technology & CISO, <i>Longfellow Investment Management</i></p> <p>Mike Meriton, Co-Founder <i>EDM Council</i></p>	<p>2:30 PM - 3:00 PM - Panel Discussion</p> <p>Encouraging data driven decisions for business success – Fostering a data governance strategy and culture</p> <p>Moderator:</p> <p>Mike Guarasci, Chief Operating Officer, <i>Polen Capital</i></p> <p>Speakers:</p> <p>Daryl Bradford, Senior Vice President Director Performance & Attribution, <i>Acadian Asset Management</i></p> <p>Tarun Sood, Chief Data Officer, <i>American Century Investments</i></p> <p>Durai Rajamanickam, AVP Data, <i>Voya Financial</i></p>	<p>2:30 PM - 3:00 PM - Fireside Chat</p> <p>Bringing critical competencies to reach alignment – Driving high client retention and nurturing customer loyalty</p> <p>Speaker:</p> <p>Anne Steer, Head of Distribution, <i>Congress Asset Management Company</i></p>

3:00 PM - 3:45 PM Afternoon Networking Break

<p>3:45 PM - 4:15 PM - Fireside Chat</p> <p>Bridging the emission data gaps – Disclosing and reporting financed emissions under the SEC's Climate Risk rule</p> <p>Speaker:</p> <p>Yovanka Bylander, Head of Sustainability, <i>TimesSquare Capital Management LLC</i></p>	<p>3:45 PM - 4:15 PM - Fireside Chat</p> <p>Readjusting how we view portfolio risk – Is the 60/40 rule still fit for purpose and what do the new approaches look like?</p> <p>Speakers:</p> <p>Nicholas Sambuco, U.S. Head of Multi-Asset Investment Consultancy & Oversight, <i>Columbia Threadneedle Investments</i></p> <p>Lei Liu, Director of Equity Investments and Portfolio Manager of Global Equities, <i>PanAgora</i></p>	<p>3:45 PM - 4:15 PM - Fireside Chat</p> <p>Adopting a multichannel and multimedia approach - Repurposing investment research to increase content reach</p> <p>Speaker:</p> <p>Gabriel Keiji Altbach, Chief Marketing Officer, <i>Voya Investment Management</i></p>
<p>4:15 PM - 5:00 PM - Panel Discussion</p> <p>Cultivating internal talents – Strengthening engagement and developing skills to nurture innovation</p> <p>Speakers:</p> <p>Jay Leopold, Head, N.A. Investment Risk Management, <i>Columbia Threadneedle Investments</i></p> <p>Zhang Zhang, Investment Analytics & Data Science Director, <i>Polen Capital Management</i></p> <p>Rachel Dorris, Director, Distribution Enablement and Analytics, <i>Principal Asset Management</i></p> <p>Jennifer J. Pearson, Chief Human Resources Officer & Employment Counsel, <i>Deerfield Management</i></p>	<p>4:15 PM - 5:00 PM - Fireside Chat</p> <p>Putting the spotlight on high-performing product structures - Which investment vehicles are paving the way to invest in private equity and debt markets?</p> <p>Speaker:</p> <p>Nick Elward, SVP, Head of Institutional Product and Head of ETFs, <i>Natixis Investment Managers</i></p>	<p>4:15 PM - 5:00 PM - Panel Discussion</p> <p>Aligning customer journey & marketing strategies – How to reimagine engagement with digital tools and data</p> <p>Speakers:</p> <p>Antonio Ferreira, VP, Senior Director, Global Marketing Strategy & Digital Execution, <i>MFS Investment Management</i></p> <p>Kelly Finneran, Head of Digital Marketing Automation, <i>John Hancock</i></p>

5:00 PM - Networking Drinks Reception - Sponsored by INVESTNET



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