

Spring 2022 Agenda Newport Beach, CA

Monday, April 4

All Day: Arrivals and Check-in

Optional: Golf, Tennis, Newport Beach Excursions, etc (on own)

6:00 PM: Vendor Partner Dinners; Optional Dinners open to all (*meet in Lobby*)

Tuesday, April 5

6:30 AM: Optional: Jog, Run, Tennis, Yoga (Amphitheater)

8:00 AM: **Registration and Welcome Networking Breakfast** (*Plaza Arbor*)

9:00 AM: **Kickoff and Opening Remarks** Hazem Gamal, COO, SME Forum

9:30 AM: **Insights: Hidden Pockets! Industry perspectives** with Matthew Schiffman (*Broadridge*)

10:30 AM: Breakout Sessions:

S1PAC: In-source vs out-source in a hybrid world

S2PL2: Launching "Next Best Action" programs

S3PL3: What NOT to include in your CRM

S4PAT: Ingesting portfolio information with marketing solutions

Noon: Networking Lunch with optional Topic Table discussions (*Plaza Arbor*)

1:30 PM: **Maximizing Sales Alignment and Territory Design** panel led by Matt Fronczke (*SS&C*) with Leah Mullen (*Putnam*), Gabe Parras (*Thornburg*), Hailing Xu (*Capital Group*), Jeff Mehi (*Franklin Templeton*)

2:30PM: These are 2-Hour Working Breakout Sessions:

S5PAC: Use cases with the SME Member Tools Inventory

S6PL2: Next Best Action" best practices exchange

S7PL3: Achieving common sales activity and digital metrics workshop

S8PAT: Segmentation for territory and organizational design

4:45 PM: **No Cookies** a fireside chat with Jonathan Wang, CTO, Van Eck

5:30 PM: **"California Dreamin" Reception and Dinner** for all participants and guests (*Amphitheater*)

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Wednesday, April 6

6:30 AM: Optional: Jog, Run, Tennis, Yoga (Amphitheater)

7:30 AM: **Networking Breakfast** (*Plaza Arbor*)

8:30 AM: **Leveraging CDPs to Deepen Client Engagement** with Marianne Hewitt (*Growth Strategy Group*) & David Raab (*CDP Institute*)

9:15 AM: Breakout Sessions:

S9PL2: Real world AI/ML usage in asset management

S10PL3: Emerging applications for team intelligence

S11PAC: Accommodating variety within global organizations

S12PAT: Value of CDP platforms in Asset Management

10:45 AM: Networking Break (*Plaza Arbor*)

11:15AM: **Talent Wars from the Front Lines of Asset Management** with Hari Krishnaswami and Kevin McKeon (*Ridgeway Partners*)

Noon: Networking Lunch with optional Topic Table discussions (*Plaza Arbor*)

1:30 PM: Breakout Sessions:

S13PL2: Building next-gen digital distribution capabilities

S14PAC: Improving talent engagement and retention

S15PAT: Capturing digital metrics in a no cookie world

S16PL3: Considerations for emerging non-MF products

3:00 PM: **Concluding session and participant panel** led by Hazem Gamal

3:30 PM: **Closing Reception and Networking** (*Pacific Patio*)

5:00 PM: Forum Concludes and Departures

6:00 PM: Vendor Partner Dinners; Optional Dinners open to all (*meet in Lobby*)

Session Room Assignments:

PL2 = Plaza II, **PL3** = Plaza III, **PAT** = Patio Room, **PAC** = Pacific Room