


FUSE Forum 2022 Agenda

Thursday, Oct. 6, 2022 | The Harvard Club of Boston

8:00 AM 8:30 AM	Breakfast & Networking #1 Welcome
FUSE Predictions, Projections & Forecast 8:45 AM	A full "strategic planning offsite" worth of insights and guidance delivered in a single session! The collective wisdom of FUSE experts, derived from years of improving distribution effectiveness for our clients, will be on full display across product structures and distribution channels. Directed by Loren Fox, Director of Research and Overseer of the Machine
Keynote Address 9:30 AM	Q&A with Ed Murphy, CEO of Empower Interviewed by T. Neil Bathon, Managing Partner & Chief Provocateur
Tactics: Use the Data 10:20 AM	The power of data is well known but few firms realize its full potential. This session will provide insights on data's impact that is so compelling that it will change how you think about the future of engagement. Moderated by Rick Ledbury, Director of Data Innovation & Utilization <ul style="list-style-type: none">• Theresa Brennan, Global Head of Distribution Enablement, T. Rowe Price• Ken Burd, Managing Director of Digital Enablement & Analytics, Principal Global Investors• John Pumphrey, Director of Sales Enablement, SalesPage Technologies 
Break 11:05 AM	Networking #2
Outlook: Alternatives to '40 Act Funds 11:25 AM	The interest in alternative products (strategies and structures) has never been higher and, with it, new predictions about the death of the mutual fund. These practitioners will shed light on the market segments that are the most vulnerable to intrusion from alternatives -- and what it takes to play in a new space. Moderated by Cindy Zarker, Director of Client Engagement Enhancement <ul style="list-style-type: none">• Pierre Caramazza, Head of Global Product for Alternatives, Franklin Templeton• Jarrett Mellman, Senior Vice President, Fund Management & Research, iCapital• Joe Moran, Managing Director, Institutional RIA Sales, Apollo Global Management
Lunch 12:15 PM Luncheon Speaker at 1:00 PM	The Future of Advice Rich Slater , Managing Director, Morgan Stanley Wealth Management 

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Outlook: FinTech's Impact on Platform & Advisor Access 1:30 PM	FinTech developments of the last 5 years have changed virtually all aspects of how advisors do business. The ability to access distributors' platforms requires that investment firms know where they fit in a wholistic solutions ecosystem. Moderated by Pat Newcomb, Director of Client Expectation Fulfillment
Tactics: Creating Engagement Magic 2:20 PM	Marketing is able to do wonderful things when it gets a little time and the right resources. Practical, tangible and measurable impact does not have to be elusive or mysterious! Moderated by Mike Evans, Partner & Director of Client Value Optimization <ul style="list-style-type: none">• Siri Allen, Account Executive, CRM Analytics, Financial Services, Salesforce• Mollie Jensen, Global Head of Marketing, Russell Investments• David Master, Global Chief Marketing Officer, Janus Henderson Investors 
Break @ 3:05 PM	Networking #3
Tactics: Salesforce Productivity 3:25 PM	Investment solutions come in a wide variety of types and sizes with each having its own optimal engagement model. Refining metrics to maximize salesforce productivity is a challenge that few beyond these panelists have mastered. Moderated by Craig Kilgallen, Director of Client Satisfaction Maximization <ul style="list-style-type: none">• Ronice Barlow, SVP, Co-Head US Retail Sales, Franklin Templeton• Brad Jung, Head of North America, Advisor & Intermediary Solutions, Russell Investments• Mike Spangler, Senior Vice President, Nationwide Financial Investment Management Group
Candor Hour (with beverages) 4:15 PM	Unvarnished insights from leading experts in distribution who are currently without restrictions or constraints (if they ever were) in terms of the keys to sales and marketing success in 2022 and beyond. Moderated by Jason Heinhorst, Partner and Director of Persistence & Optimism <ul style="list-style-type: none">• George Riedel, Former Head U.S. Intermediaries, T. Rowe Price• Don Roberson, Former Managing Director, Distribution, ProShares• Marty Willis, Former Enterprise Chief Marketing Officer, TIAA
5:15 PM	FUSE Product & Distribution Awards Presented by T. Neil Bathon
5:45 PM	Cocktail Reception & Networking #4