

AGENDA FOR THE FIRESIDE FORUMS

SUNDAY, JANUARY 5

LEADERSHIP

8:00pm 8:45pm

CONTENT FORUM 1 – presented by Nativo
“The Snowball Effect: Winning Ways to Lead with Thought Leadership”

Panel discussion with:

- **Rebecca Kniesel**, *Chief Marketing Officer, Jennison Associates*
- **Katherine Boylan**, *Director of Integrated Marketing, Jennison Associates*

8:45pm 9:30pm

CONTENT FORUM 2 – presented by Yahoo Finance
“Redefining the Role of Content”

One on one interview with:

- **Ryan McHardy**, *Chief Strategy Officer, Americas, Dentsu*

9:30pm 10:00pm

FCS LEADERSHIP AWARD PRESENTATION – presented by Ptarmigan Media
Kimberly Boone, *Managing Director, Ptarmigan Media* will interview **Jennifer Grazel**, *Global CMO, RBC Capital Markets*, the winner of the 2024 FCS Leadership Award (honoring Jamie E. DePeau).

MONDAY, JANUARY 6

REPUTATION

9:00am 9:45am

CONTENT FORUM 3 – presented by Level Agency
“Better Together: A Growth Breakthrough for Financial Marketing”

Case study presentation with:

- **Briana Hovington-Akonnor**, *Senior Manager, Growth Acquisition, Better.com*
- **Patrick Van Gorder**, *President, Head of Partnerships, Level Agency*
- **Mitch Moore**, *VP, Marketing, Level Agency*

9:45am 10:30am

CONTENT FORUM 4 – presented by The Bliss Group
Kristin Gower, *Global President, EssenceMediacom* will be interviewed by **Reed Handley**, *EVP, Head of Growth and Financial Services Practice, Co-Lead, The Bliss Group*.

10:30am 11:15am

CONTENT FORUM 4 – presented by The New York Times
Jimmy Saunders, *Executive Director, The New York Times* will conduct two interviews:

- **Kristin Tallman Lane**, *Head of Brand Strategy, Marketing & Customer Engagement, MassMutual*
- **Michael Biesel**, *Chief Marketing Officer, Retirement Solutions, TIAA*

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MONDAY, JANUARY 6

REPUTATION

- 1:30pm 2:15pm *CONTENT FORUM 5 – presented by Reuters*
“Protecting & Pushing: The Art of Brand-Safe Expansion”
 Fireside chat with:
 • **Toni Clayton-Hine, CMO, EY**
 • **Lauren Young, Special Projects Editor, Reuters**
- 2:15pm 3:00pm *CONTENT FORUM 6 – presented by Bloomberg Media*
 Fireside chat with:
 • **John Brockelman, CMO, State Street Global Advisors**
 • **Sheevani Raikundalia, Executive Head of Financial Advertising Sales, North America, Bloomberg Media**
- 3:00pm 3:45pm *CONTENT FORUM 7 – presented by Bloomberg Media*
“Trust in Action: The Importance of Leadership, Brand Partnership & Impact in a Polarized World”
Michelle Lynn, Global Head of Data Science & Insight, Bloomberg Media, will lead a panel discussion with:
 • **Kirti Naik, Global Head of Brand Experience, Neuberger Berman**
 • **Tavia Davis, VP, Head of Paid Media, Goldman Sachs Asset Management**
 • **Katy Brady, Director, Brand, Invesco**
 • **Andrew DeCaro, Director, Marketing & Advertising, Grayscale Investments**
- 3:45pm 4:30pm *CONTENT FORUM 8 – presented by WSJ | Barron’s Group*
“Using Data To Strategize, Optimize & Measure Brand Reputation”
Raakhee Mirchandani, VP Custom Programming and Anchor, The Trust at the Wall Street Journal Barron's Group will interview **Sheryl Markov, EVP, Digital Marketing, Design & Delivery, Northern Trust**
- 4:30pm 5:00pm *AWARD FORUM 2 – presented by WSJ | Barron’s Group*
Raakhee Mirchandani will interview **Kristie Nettles, VP/MD, Head of Institutional (North America) and Insurance Marketing, AllianceBernstein**, who will accept the 2024 FCS Brand Reputation Award on behalf of her colleague **Jaime Mann, VP/MD, Head of Creative Services & Global Brand Management, AB**

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TUESDAY, JANUARY 7

PARTNERSHIP

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| 1:30pm | 2:15pm | <p><i>CONTENT FORUM 9</i> – presented by Business Insider
Following a presentation of proprietary research on generational wealth transfer, Business Insider SVP Anthony DeMaio will interview Pam Piligian, CMO, Navy Federal Credit Union</p> |
| 2:15pm | 3:00pm | <p><i>CONTENT FORUM 10</i> – presented by Ptarmigan Media
Kimberly Boone, Managing Director, Ptarmigan Media, will present the agency’s proprietary 2024/2025 Financial Advisor Research, followed by <i>Director Adam Klareich</i> moderating a discussion on “The Role of Data & Research in Marketing Partnerships” with:</p> <ul style="list-style-type: none"> • Greg Clunies, Senior Manager, Paid Media, Ameriprise Financial • Allison Knightly, Marketing Director, Paid Media, Columbia Threadneedle Investments |
| 3:00pm | 3:45pm | <p><i>CONTENT FORUM 11</i> – presented by Corporate Insight
“The Digital Advisor in 2025: New Data on Resource Preferences and Client Relationships”
Michael Ellison, President, Corporate Insight, will present his firm’s proprietary research and then lead a Q&A with Hailey Brent, Senior Vice President, Brand Strategy, BNY Wealth, on the use of data in advisor marketing.</p> |
| 3:45pm | 4:30pm | <p><i>CONTENT FORUM 12</i>
“Summit Takeaways”
Katrina Noelle, President, KNow Research, and Kevin Windorf, CMO, 2112 Communications, will present a series of actionable takeaways from the 3 days of Fireside Forums. Additional speakers to be named.</p> |
| 4:30pm | 5:00pm | <p><i>AWARD FORUM 3</i>
Chris Donahoe, Executive Vice President and Head of AI Strategy, Edelman Smithfield, will be on hand to accept the 2024 FCS Marketing Partnership Award, won by iShares by BlackRock and Edelman. Chris will conduct a one-on-one interview with a financial marketing executive to be announced.</p> |