

## 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:

- **Toni Clayton-Hine, 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 Brand Leadership, Partnership & Impact”**

**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***

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