

## 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 | <p><i>CONTENT FORUM 5 – presented by Reuters</i><br/> <b>“Protecting &amp; Pushing: The Art of Brand-Safe Expansion”</b><br/>         Fireside chat with:</p> <ul style="list-style-type: none"> <li>• <b>Toni Clayton-Hine, CMO, EY</b></li> <li>• <b>Lauren Young, Special Projects Editor, Reuters</b></li> </ul>  |
| 2:15pm | 3:00pm | <p><i>CONTENT FORUM 6 – presented by Bloomberg Media</i><br/>         Fireside chat with:</p> <ul style="list-style-type: none"> <li>• <b>John Brockelman, CMO, State Street Global Advisors</b></li> <li>• <b>Sheevani Raikundalia, Executive Head of Financial Advertising Sales, North America, Bloomberg Media</b></li> </ul>   |
| 3:00pm | 3:45pm | <p><i>CONTENT FORUM 7 – presented by Bloomberg Media</i><br/> <b>“Trust in Action: The Importance of Leadership, Brand Partnership &amp; Impact in a Polarized World”</b><br/> <b>Michelle Lynn, Global Head of Data Science &amp; Insight, Bloomberg Media</b>, will lead a panel discussion with:</p> <ul style="list-style-type: none"> <li>• <b>Kirti Naik, Global Head of Brand Experience, Neuberger Berman</b></li> <li>• <b>Tavia Davis, VP, Head of Paid Media, Goldman Sachs Asset Management</b></li> <li>• <b>Katy Brady, Director, Brand, Invesco</b></li> <li>• <b>Andrew DeCaro, Director, Marketing &amp; Advertising, Grayscale Investments</b></li> </ul> |
| 3:45pm | 4:30pm | <p><i>CONTENT FORUM 8 – presented by WSJ   Barron’s Group</i><br/> <b>“Using Data To Strategize, Optimize &amp; Measure Brand Reputation”</b><br/> <b>Raakhee Mirchandani, VP Custom Programming and Anchor, The Trust at the Wall Street Journal Barron's Group</b> will interview <b>Sheryl Markov, EVP, Digital Marketing, Design &amp; Delivery, Northern Trust</b></p>   |
| 4:30pm | 5:00pm | <p><i>AWARD FORUM 2 – presented by WSJ   Barron’s Group</i><br/> <b>Raakhee Mirchandani</b> will interview <b>Kristie Nettles, VP/MD, Head of Institutional (North America) and Insurance Marketing, AllianceBernstein</b>, who will accept the 2024 FCS Brand Reputation Award on behalf of her colleague <b>Jaime Mann, VP/MD, Head of Creative Services &amp; Global Brand Management, AB</b></p>  |

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**TUESDAY, JANUARY 7**

***PARTNERSHIP***

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|--------|--------|--|
| 1:30pm | 2:15pm | <p><i>CONTENT FORUM 9</i> – presented by <b>Business Insider</b><br/>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</i> – presented by <b>Ptarmigan Media</b><br/><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</i> – presented by <b>Corporate Insight</b><br/><b>“The Digital Advisor in 2025: New Data on Resource Preferences and Client Relationships”</b><br/><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><br/><b>“Summit Takeaways”</b><br/><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><br/><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 <b>Beth Bamonte, Director of Analyst Relations, IBM</b> and <b>President, ANA Business Marketing NYC</b>.</p>  |