

TUESDAY, JUNE 14

4:00 p.m. – 7:00 p.m. **REGISTRATION OPEN** Longhorn D-F Marble Foyer

DAY 1 | WEDNESDAY, JUNE 15

7:00 a.m. – 7:00 p.m. **REGISTRATION OPEN** Longhorn D-F Marble Foyer

7:45 a.m. – 9:30 a.m. **BREAKFAST IN THE EXHIBIT HALL** Longhorn D-F

8:00 a.m. – 9:25 a.m. **SHOWCASE STAGE SESSION 1 IN THE EXHIBIT HALL** Longhorn D-F

8:00 a.m. – 8:25 a.m. **Showcase Stage A**
Investing in Innovation: The Noise, Nuance & Number by ARK Invest
 Thomas Hartmann-Boyce, CFA, Client Portfolio Manager, ARK Invest

8:00 a.m. – 8:25 a.m. **Showcase Stage B**
A Look Under the Umbrella of ESG by Thrivent
 Dan Chouanard, CIMA[®], Vice President, Head of Mutual Fund Sales &
 Distribution, Thrivent Asset Management

8:30 a.m. – 8:55 a.m. **Showcase Stage A**
The Family Dynamics of Intergenerational Wealth Transfer by T. Rowe Price
 Jean Dunn, Vice President, T. Rowe Price Associates Inc.

8:30 a.m. – 8:55 a.m. **Showcase Stage B**
Megatrends: Own the Future by BlackRock
 Jeff Spiegel, Director, Head of iShares Megatrend, Sector and
 International ETFs, BlackRock

9:00 a.m. – 9:25 a.m. **Showcase Stage A**
2022 Top Compliance Challenges and Solutions by Orion
 Joe Badalucco, Senior Internal Sales, Orion

9:00 a.m. – 9:25 a.m. **Showcase Stage B**
Crypto 101: Bitcoin, Blockchain and Crypto by Bitwise
 Matthew Hougan, CIO, Bitwise Asset Management

9:45 a.m. – 10:30 a.m. **CONCURRENT SESSION 1** Grapevine Ballroom A

1. Breakout
Are You Digitally Durable? Protect Yourself From Cyber Threats
 David Crow, Co-Head, Relationship Management, Wealth Solutions,
 BNY Mellon | Pershing
 Maria-Kristina Hayden, Head of Cybersecurity, Wargames and Awareness,
 BNY Mellon

2. Breakout Grapevine Ballroom D
From Workforce to Competitive Driving Force
 Moderator: Christina Townsend, Co-Head, Relationship Management,
 Wealth Solutions, BNY Mellon | Pershing
 Hunter Judson, Jr., Principal, Wealth Management Practice Director,
 The Judson Group
 Jennifer Wagoner Kirksey, Managing Director of Wealth Operations,
 Tolleson Wealth Management
 Wendy Taylor Wampler, Director of Leader and Organizational
 Effectiveness, indeed.com

9:45 a.m. – 10:30 a.m.

CONCURRENT SESSION 1 (CONTINUED)

3. Breakout

Grapevine Ballroom C

Demystify Your Tech Stack: The Latest in Integration and Interoperability

Moderator: Morgan McGovern, Vice President, Technology Consulting, BNY Mellon | Pershing
Rick Higgins, CEO, Risclarity
Scott Lamont, Director, Consulting Services, F2 Strategy
Mojgan Nowain, Director, Information Technology, Capital Group

4. Breakout

Grapevine Ballroom B

Not Your Grandparents' Investing Strategy: The Democratization of Investing

Moderator: Nader Souri, Head of Technology Banking, BNY Mellon
Tarun Bhatnagar, Co-Founder and CEO, Arbo Works
David Dindi, Co-Founder and CEO, Atomic Invest

5. Masterclass

Grapevine Ballroom 3-4

Women in Tech (*Exclusive access 40 attendees*)

Sarah Chain, Director, Head of Digital Product, Pershing X
Sonjii Ivey, Director, Technology Client Engagement, BNY Mellon | Pershing
Anjali Shah, Managing Director, Head of Product, Advisor Center, BlackRock

6. Learning Lab

Grapevine Ballroom 1-2

**Get Personal: How to Customize the Client Experience
With our Award-Winning Albridge Report Designer**

(*Exclusive access 40 attendees*)

John Wolff, Vice President, Product Management for Data and Insights, Pershing X

7. Meet the Experts

Grapevine Ballroom 5-6

DEI Leaders (*Exclusive access 40 attendees*)

Tonia Bottoms, Managing Director, Senior Managing Counsel and
Pershing's Diversity, Equity and Inclusion Advocate, BNY Mellon | Pershing

10:30 a.m. – 10:45 a.m.

BREAK

10:45 a.m. – 11:30 a.m.

CONCURRENT SESSION 2

1. Breakout

Grapevine Ballroom C

Should M&A Be Part of Your Firm's DNA?

Moderator: Lisa Crafford, Director, Business Consulting, BNY Mellon | Pershing
Karen Denise, Head of Wealth Client Services, CapTrust Advisors
Bomy Hagopian, CFA, Partner and Co-Head of Wealth Management Advisory,
Berkshire Global Advisors

2. Breakout

Grapevine Ballroom A

Navigating the Regulatory Landscape—SEC Exam and Regulatory Priorities 2022

Moderator: Jesse Lawrence, Associate General Counsel, BNY Mellon | Pershing
Marshall Gandy, Associate Regional Director; Co-Head, National Investment
Advisory/Investment Company Programs, U.S. Securities and Exchange Commission

3. Breakout

Grapevine Ballroom D

Harness the Power of Artificial Intelligence to Gain Real Business Insights

Moderator: Peter Antonucci, Managing Director, BNY Mellon | Pershing
Erick Brethenoux, Key Initiative Leader, AI Team, Gartner
Joe Caserta, CEO and Founder, Caserta
Craig Iskowitz, CEO and Founder, Ezra Group, LLC

10:45 a.m. – 11:30 a.m.	CONCURRENT SESSION 2 (CONTINUED)	
	4. Breakout	Grapevine Ballroom B
	Tap the Power of Lending Solutions to Drive Asset Growth Moderator: Jane Volkonitskaya, Director, Lending Solutions, BNY Mellon Pershing Mitchell Herr, CEO, Custos Family Office LLC Nathan James, RICP®, Business Development Associate, Park Avenue Securities Missy A. Reichert, CFP®, Client Services Manager, Oxford Group	
	5. Masterclass	Grapevine Ballroom 3-4
	Recruiting Strategies: Advisors Got Talent (Exclusive access 40 attendees) Caleb Brown, MBA, CFP®, Co-Founder and CEO, New Planner Recruiting Ashley Cox, Vice President, Wealth Solutions, BNY Mellon Pershing	
	6. Learning Lab	Grapevine Ballroom 1-2
	What's New in NetX360® (Exclusive access 40 attendees) Vito Ancona, Vice President, BNY Mellon Pershing Kameela Walker, Vice President, BNY Mellon Pershing	
	7. Meet the Experts	Grapevine Ballroom 5-6
	Broker-Dealer Executives (Exclusive access 40 attendees) Bill Bruckner, Head of Consulting & Implementation, Wealth Solutions, BNY Mellon Pershing Maura Creekmore, Co-Head of Wealth Solutions, BNY Mellon Pershing	
11:30 a.m. – 1:00 p.m.	LUNCH IN THE EXHIBIT HALL	Longhorn D-F
11:45 a.m. – 1:10 p.m.	SHOWCASE STAGE SESSION 2 IN THE EXHIBIT HALL	Longhorn D-F
11:45 a.m. – 12:10 p.m.	Showcase Stage A Unlocking the Opportunity in Alternatives by First Trust Michael Peck, CFA, President, Co-CIO, First Trust Capital Management	
11:45 a.m. – 12:10 p.m.	Showcase Stage B Planning Amid Tax and Market Uncertainties: Five Conversations to Have With Clients Now by Nuveen James A. Bergeron, J.D., Advisor Education Consultant, Nuveen	
12:15 p.m. – 12:40 p.m.	Showcase Stage A The Markets, They Are a-Changin' by FS Investments Robert Hoffman, CFA, Managing Director, Investment Research, FS Investments	
12:15 p.m. – 12:40 p.m.	Showcase Stage B The Ascendancy of Millennials and How the Future of Finance Is More Female by Federated Hermes Steve Chiavarone, CFA, Vice President, Head of Multi-Asset Solutions, Senior Portfolio Manager, Federated Hermes	
12:45 p.m. – 1:10 p.m.	Showcase Stage A Maximizing Tax Alpha: Diving Deeper Into the Benefits of Custom Direct Indexing by PGIM Investments Brian Jacobs, CIMA®, Head of Client Portfolio Management, PGIM Investments	
12:45 p.m. – 1:10 p.m.	Showcase Stage B Practice Management in the Face of ESG and a Demographic Shift by DWS John Cianciulli, President, Team Edge Consulting	

1:25 p.m. – 3:15 p.m.	KEYNOTE SESSION 1	Texas Ballroom
1:25 p.m. – 1:35 p.m.	Celebratory Opening Kickoff Dallas Cowboys Rhythm & Blue Dancers	
1:35 p.m. – 1:55 p.m.	Welcome and Strategy View Jim Crowley, CEO, BNY Mellon Pershing Emily Schlosser, COO, BNY Mellon Pershing	
1:55 p.m. – 2:00 p.m.	Sponsor Introduction: Federated Brian Ronayne, Executive Vice President, Federated Hermes	
2:00 p.m. – 2:45 p.m.	Leading for the Future Moderator: Emily Schlosser, COO, BNY Mellon Pershing Indra Nooyi, Former CEO and Chairman of PepsiCo, <i>NY Times</i> best-selling author	
2:45 p.m. – 3:15 p.m.	Wealth Management Evolution: How to Compete in a Crowded Market Moderator: Ben Harrison, Co-Head of Wealth Solutions, BNY Mellon Pershing Catherine Keating, CEO, BNY Mellon Wealth Management Ainslie Simmonds, President, Pershing X Hanneke Smits, CEO, BNY Mellon Investment Management	
3:15 p.m. – 4:15 p.m.	EXTENDED NETWORKING BREAK IN THE EXHIBIT HALL	Longhorn D-F
3:30 p.m. – 5:55 p.m.	SHOWCASE STAGE SESSION 3 IN THE EXHIBIT HALL	Longhorn D-F
3:30 p.m. – 3:55 p.m.	Showcase Stage A The Elements of Extraordinary Teamwork: Better Client Outcomes by Janus Henderson Michael Futterman, Head of Knowledge Labs® Professional Development, Janus Henderson Investors	
3:30 p.m. – 3:55 p.m.	Showcase Stage B Utilizing AppCrown’s SavantHe App to Measure the Temperature of the Client Relationship by AppCrown Franklin Tsung, Chief Growth Officer, AppCrown LLC Chris Volpe, Zephyr—Head of Wealth & Asset Management, AppCrown LLC	
4:00 p.m. – 4:25 p.m.	Showcase Stage A Financial Planning for the Special Needs Community by Voya Matt Stagner, CFP®, ChSNC®, Voya Cares Business Development	
4:00 p.m. – 4:25 p.m.	Showcase Stage B An Introduction to Charitable Giving by PIMCO Devin Ekberg, CFA, CIMA®, CPWA®, Senior Consultant, Advisor Education, PIMCO	
4:30 p.m. – 4:55 p.m.	Showcase Stage A How to Get the Most Out of Your ETF Trades by American Century Investments Edward Rosenberg, Senior Vice President, Head of ETFs, American Century Investments	
4:30 p.m. – 4:55 p.m.	Showcase Stage B Invest for Success With the High-Net-Worth: Build, Preserve, and Transfer Wealth by Goldman Sachs Izabella Goldenberg, U.S. Head of Portfolio Strategy, Goldman Sachs	
5:00 p.m. – 5:25 p.m.	Showcase Stage A Deliver Personalization at Scale by Envestnet Patrick Gaul, Sales Engineer Director, Envestnet	

5:00 p.m. – 5:25 p.m.	<p>Showcase Stage B Take NetXInvestor® Personalization to the Next Level With Site Builder by BNY Mellon Pershing John Berglowe, Head of Digital Investor Experience, BNY Mellon Pershing Adam Esposito, Vice President, BNY Mellon Pershing</p>	
5:30 p.m. – 5:55 p.m.	<p>Showcase Stage A Pursuing Rising Income: Navigating Distribution in a Low-Rate World by Capital Group Dale Hanks, Equity Investment Director, Capital Group</p>	
5:30 p.m. – 5:55 p.m.	<p>Showcase Stage B The Future of Personalized Investing: Direct Indexing by BNY Mellon Investment Management and Dreyfus Eric Hundahl, Head of Portfolio Strategy, BNY Mellon Investment Management Stephanie Pierce, CEO, Dreyfus, Mellon & Exchange-Traded Funds, BNY Mellon Investment Management Dr. Vijay Vaidyanathan, Head of Portfolios and Direct Indexing, Pershing X</p>	
4:15 p.m. – 5:00 p.m.	<p>CONCURRENT SESSION 3</p> <p>1. Breakout Grapevine Ballroom C Expect Exceptional: How to Deliver on Client Experience Moderator: Evan LaHuta, Head of Client Experience, Wealth Solutions, BNY Mellon Pershing Dennis Moseley-Williams, Customer Experience Specialist, DMW Strategic Consulting</p> <p>2. Breakout Grapevine Ballroom D Some Like It Hot Off the Press: Views on Market Trends Moderator: Matt Forester, CIO, Lockwood, Managing Director, BNY Mellon Pershing Shamik Dhar, Chief Economist, BNY Mellon Investment Management Christopher Dillon, CFA, Investment Specialist, Multi-Asset Division, Vice President, T. Rowe Price Group, Inc.</p> <p>3. Breakout Grapevine Ballroom A Less Time on Operations Processing = More Time for Growth Moderator: Matt Sonnen, Founder and CEO, PFI Advisors Raelene Aldridge, Director of Operations, Cetera Financial Group Seth Baerson, Director, Operations Consulting, BNY Mellon Pershing</p> <p>4. Sponsored Breakout Grapevine Ballroom B Orlando's Outlook: Volatility Rains in 2022 by Federated Hermes Phil Orlando, CFA, Senior Vice President, Chief Equity Market Strategist, Federated Hermes</p> <p>5. Masterclass Grapevine Ballroom 3-4 Technology Innovation (<i>Exclusive access 40 attendees</i>) Janet Balis, Principal, Market Practice Leader, Ernst & Young LLP</p> <p>6. Learning Lab Grapevine Ballroom 1-2 Improve Efficiency With NetX360® Managed Accounts Tools (<i>Exclusive access 40 attendees</i>) Laura Nesbitt, Vice President, BNY Mellon Pershing Kimberly Schmidt, Vice President, BNY Mellon Pershing</p> <p>7. Meet the Experts Grapevine Ballroom 5-6 Operations Leaders (<i>Exclusive access 40 attendees</i>) Nancy Newcome, Head of Transformation, BNY Mellon Pershing Claire Santaniello, Head of Operations, BNY Mellon Pershing</p>	
5:00 p.m. – 7:00 p.m.	<p>RECEPTION IN THE EXHIBIT HALL</p>	Longhorn D-F

DAY 2 | THURSDAY, JUNE 16

7:00 a.m. – 5:00 p.m.	REGISTRATION OPEN	Longhorn D-F Marble Foyer
7:15 a.m. – 8:45 a.m.	BREAKFAST IN THE EXHIBIT HALL	
7:30 a.m. – 8:25 a.m.	SHOWCASE STAGE SESSION 4 IN THE EXHIBIT HALL	Longhorn D-F
7:30 a.m. – 7:55 a.m.	Showcase Stage B Advance to Agile: Three Steps to Transformation by BNY Mellon Pershing Dan Adler, Head of Engineering, Pershing X Sarah Chain, Head of Product, Pershing X	
8:00 a.m. – 8:25 a.m.	Showcase Stage A The 2022 Protective Investing Playbook by Halo Investing Jason Barsema, President and Co-Founder, Halo Investing	
8:00 a.m. – 8:25 a.m.	Showcase Stage B Women Leading the Way in Alts (Part 1) by BNY Mellon Pershing Lisa Lewin, Director, Prime Services, BNY Mellon Pershing Tetiana Kyslytsyna, CAIA, Associate Director, Hedge Fund Research Analyst, UBS Hedge Fund Solutions	
9:00 a.m. – 10:15 a.m.	KEYNOTE SESSION 2	Texas Ballroom
9:00 a.m. – 9:10 a.m.	Welcome Remarks Anna D'Amico, Executive Group Manager, Wealth Solutions Relationship Management, BNY Mellon Pershing	
9:10 a.m. – 9:40 a.m.	Trust and Innovation: BNY Mellon's Bright Future Moderator: Maura Creekmore, Co-Head of Wealth Solutions, BNY Mellon Pershing Robin Vince, President and CEO-Elect, BNY Mellon	
9:40 a.m. – 10:15 a.m.	Reimagine the Future of Money Moderator: Carol Massar, Anchor, Bloomberg BusinessWeek TV and Radio Matthew Hougan, CIO, Bitwise Asset Management Stephanie Pierce, CEO, Dreyfus, Mellon & Exchange-Traded Funds, BNY Mellon Investment Management Matt Walsh, Co-Founder, Castle Island Ventures	
10:15 a.m. – 10:45 a.m.	NETWORKING BREAK	
10:45 a.m. – 11:30 a.m.	CONCURRENT SESSION 4	
	1. Breakout	Grapevine Ballroom D
	Sustainable Investing: More Than Media Buzz Moderator: Tony Destro, CFA, CAIA, Director of Investments, Lockwood, BNY Mellon Pershing Scott Mackey, Vice President, Responsible Investment Strategy Specialist, Calvert Research and Management Jasmine Yu, Head of Global Manager Research, BNY Mellon Investor Solutions	
	2. Breakout	Grapevine Ballroom C
	Direct Indexing: Now, Next and Tech Moderator: Brendan O'Neill, CFA, Director, Advisory Solutions, Lockwood, BNY Mellon Pershing David DiPetrillo, CFA, Head of North America Product & Client Service, BNY Mellon Investment Management Dr. Vijay Vaidyanathan, Head of Portfolios and Direct Indexing, Pershing X	

10:45 a.m. – 11:30 a.m.	CONCURRENT SESSION 4 (CONTINUED)	
	<p>3. Sponsored Breakout Pardon the Interruption: A Real-Time Take on the Fed, Market and Economy by Federated Hermes Steve Chiavarone, CFA, Vice President, Head of Multi-Asset Solutions, Senior Portfolio Manager, Federated Hermes Philip Orlando, CFA, Senior Vice President, Chief Equity Market Strategist, Federated Hermes</p>	Grapevine Ballroom B
	<p>4. Masterclass M&A: Getting Ready for the Deal (<i>Exclusive access 40 attendees</i>) Lisa Crafford, Director, Business Consulting, BNY Mellon Pershing Matt Sonnen, Founder and CEO, PFI Advisors</p>	Grapevine Ballroom 3-4
	<p>5. Learning Lab Level Up: Five Surefire Strategies to Boost Your Online Presence (<i>Exclusive access 40 attendees</i>) Drew Hirschler, Vice President, Practice Management, BNY Mellon Pershing April Rudin, Founder and CEO, The Rudin Group</p>	Grapevine Ballroom 1-2
	<p>6. Meet the Experts Technology Innovation Leaders (<i>Exclusive access 40 attendees</i>) Tim Foley, Head of Technology Product Management, BNY Mellon Pershing Ram Nagappan, CIO, BNY Mellon Pershing</p>	Grapevine Ballroom 5-6
11:30 a.m. – 1:30 p.m.	LUNCH IN THE EXHIBIT HALL	Longhorn D-F
11:45 a.m. – 1:40 p.m.	SHOWCASE STAGE SESSION 5 IN THE EXHIBIT HALL	Longhorn D-F
11:45 a.m. – 12:10 p.m.	<p>Showcase Stage A Taking Politics out of ESG by Federated Hermes Mary Green, Vice President, Client Portfolio Manager, Federated Hermes</p>	
11:45 a.m. – 12:10 p.m.	<p>Showcase Stage B Critical Strategies for Turning Heirs Into Clients by SS&C Black Diamond Kyle Fleming, CFA, Senior Manager, SS&C Advent</p>	
12:15 p.m. – 12:40 p.m.	<p>Showcase Stage A Direct Indexing: What It Is, How It Works, and How It Will Transform the Way People Invest by FTSE Russell Avita T. Sukhram, Director, Equity Index Product Wealth, FTSE Russell Thor McIlrath, Owner, McIlrath & Eck, LLC</p>	
12:15 p.m. – 12:40 p.m.	<p>Showcase Stage B Pershing X: Rows Not Columns—Traversing the Silos of Today’s Advisory Software Bryan Hamilton, Head of Design, Pershing X</p>	
12:45 p.m. – 1:10 p.m.	<p>Showcase Stage A Emotional Intelligence (EQ)—It’s What Differentiates You by Schafer Cullen Jeff Strese, Founder and Owner, Jeff Strese Consulting Group</p>	
12:45 p.m. – 1:10 p.m.	<p>Showcase Stage B Emerging Markets: A Tale of Different Forces and Opportunities by Transamerica Scott Moses, CFA, Head of Emerging Market Debt, Transamerica</p>	

1:15 p.m. – 1:40 p.m. **Showcase Stage A**
The Pathway to Inclusive Investment by BNY Mellon Investment Management and Dreyfus Stephanie Pierce, CEO, Dreyfus, Mellon & Exchange-Traded Funds, BNY Mellon Investment Management

1:15 p.m. – 1:40 p.m. **Showcase Stage B**
Alternative Credit: Understanding the Asset Class by First Eagle Andrew Park, SVP for First Eagle Alternative Credit's Tradable Credit, First Eagle

2:00 p.m. – 2:45 p.m.

CONCURRENT SESSION 5

1. Sponsored Breakout Grapevine Ballroom D

Opportunities Without Borders: Offshore Asset Allocation

by BlackRock, PIMCO and Federated Hermes

Moderator: Matt Forester, CIO, Lockwood, Managing Director, BNY Mellon | Pershing
Steve Chiavarone, CFA, Vice President, Head of Multi-Asset Solutions, Senior Portfolio Manager, Federated Hermes

Eric Mueller, Director, Multi-Asset Strategies & Solutions Group, BlackRock

Jason Odom, Senior Vice President and Asset Allocation Strategist, PIMCO

2. Breakout

Grapevine Ballroom A

How the (Retirement) West Will Be Won

Shadia Kirk, Vice President, Product Management, BNY Mellon | Pershing

Bruce Wolfe, CFA, Head of Individual Retirement Strategy, Insight Investment

3. Breakout

Grapevine Ballroom C

The Digital Assets Revolution

Moderator: Jay Chu, Vice President, Wealth Solutions, BNY Mellon | Pershing

Moriah Kairouz Batza, Alliance Director, Partner Services, Chainalysis

Sebastian Corrochano, Head of Capital Formation, Galaxy Vision Hill

Manoj Ramachandran, Director, Digital Assets, BNY Mellon

4. Sponsored Breakout

Grapevine Ballroom B

Uncharted Waters: The Future of Fixed Income Allocation

by BNY Mellon Investment Management

Eric Hundahl, Head of Portfolio Strategy, BNY Mellon Investment Management

Vincent Reinhart, Chief Economist and Macro Strategist,

BNY Mellon Investment Management

5. Masterclass

Grapevine Ballroom 3-4

Meet the Managers in Alternatives (*Exclusive access 40 attendees*)

Moderator: Lisa Lewin, Director, Prime Services, BNY Mellon | Pershing

Ian France, CFA, Director, Research Analyst, MacKay Shields LLC

Claudio Macchetto, Managing Director, Business Development,

GoldenTree Asset Management

Bruno Machado, Managing Director, National Head of Family Office Sales,

MacKay Shields LLC

Anthony Young, CIO, Edendale Capital

6. Learning Lab

Grapevine Ballroom 1-2

Reboot Your Digital Marketing Plan (*Exclusive access 40 attendees*)

Jeff Caruso, Vice President, Practice Management, BNY Mellon | Pershing

Egle Wilcher, Vice President, Practice Management, BNY Mellon | Pershing

2:00 p.m. – 2:45 p.m.	CONCURRENT SESSION 5 (CONTINUED)	
	7. Meet the Experts RIA Leaders (<i>Exclusive access 40 attendees</i>) Bill Bruckner, Head of Consulting and Implementation, Wealth Solutions, BNY Mellon Pershing Megan Carpenter, CEO and Co-Founder, FiComm Partners Brian Hamburger, President and Chief Executive Officer, MarketCounsel and the Hamburger Law Firm Ben Harrison, Co-Head of Wealth Solutions, BNY Mellon Pershing	Grapevine Ballroom 5-6
3:00 p.m. – 4:00 p.m.	SHOWCASE STAGE SESSION 6 IN THE EXHIBIT HALL	Longhorn D-F
3:00 p.m. – 3:25 p.m.	Showcase Stage A How the Convergence of Psychology and Technology Can Help You Understand Your Clients Better Than Ever to Drive Success Brian Pasalich, Chief Executive Officer, Co-Founder, Syntoniq, Inc.	
3:00 p.m. – 3:25 p.m.	Showcase Stage B Women Leading the Way in Alts (Part 2) by BNY Mellon Pershing Lisa Lewin, Director, Prime Services, BNY Mellon Pershing Tetiana Kyslytsyna, CAIA, Associate Director, Hedge Fund Analyst, UBS Hedge Fund Solutions	
3:30 p.m. – 3:55 p.m.	Showcase Stage A Pro Bono Financial Planning: Join the Movement! by Foundation for Financial Planning Jon Dauphine, Esq., CEO, Foundation for Financial Planning Ben Harrison, Co-Head of Wealth Solutions, BNY Mellon Pershing	
3:30 p.m. – 3:55 p.m.	Showcase Stage B Increasing Diverse-Owned Manager Representation: Women & Minority Asset Manager Trends by BNY Mellon Pershing Shaheen Contractor, CFA, ESG Research Analyst, Bloomberg LP Amber DeLeo, CFA, Senior Research Analyst, Lockwood, BNY Mellon Pershing	
3:00 p.m. – 4:00 p.m.	EXTENDED NETWORKING BREAK IN THE EXHIBIT HALL	Longhorn D-F
4:15 p.m. – 5:00 p.m.	KEYNOTE SESSION 3	Texas Ballroom
4:15 p.m. – 4:20 p.m.	Sponsor Introduction: BNY Mellon Investment Management and Dreyfus Stephanie Pierce, CEO, Dreyfus, Mellon & Exchange-Traded Funds, BNY Mellon Investment Management	
4:20 p.m. – 5:00 p.m.	UNTHINK Erik Wahl, Synthesizer of Art and Business	
7:00 p.m. – 11:00 p.m.	CLOSING NIGHT EVENT	Glass Cactus

DAY 3 | FRIDAY, JUNE 17

8:00 a.m. – 12:00 p.m.	REGISTRATION OPEN	
8:30 a.m. – 9:30 a.m.	BREAKFAST IN KEYNOTE SESSION	
9:00 a.m. – 11:30 a.m.	KEYNOTE SESSION 4	Texas Ballroom
9:00 a.m. – 9:10 a.m.	Welcome Remarks Rebecca Kariuki, Senior Principal, Business Development, BNY Mellon Pershing	
9:10 a.m. – 9:55 a.m.	A Perspective From Washington—Get the Big Picture: Geopolitics, Economics, Elections and More Moderator: Kevin McCarthy, Senior Executive Vice President and General Counsel, BNY Mellon Jennifer Xi, Managing Director and Global Head of Public Policy and Government Affairs, BNY Mellon	
9:55 a.m. – 10:30 a.m.	UNIVERSITY STUDENT RECRUITING EVENT	
10:30 a.m. – 11:20 a.m.	Insightful Leaders: Top Advisors Reveal Their Market Edge Moderator: Jack Otter, Editor-at-Large, Barron's Christina Collins, Private Wealth Advisor, Northwestern Mutual Investment Services Chris Cooke, Partner, Cooke Financial Group Richard Joyner, President, Tolleson Wealth Management	
11:20 a.m. – 11:30 a.m.	Closing Remarks Jim Crowley, CEO, BNY Mellon Pershing Emily Schlosser, COO, BNY Mellon Pershing	

CONTINUING EDUCATION (CE) CREDITS

You will have the opportunity to receive 15.5 CE credits from the Investments and Wealth Institute™ (IWI). To request IWI credits, please send an email to insite@pershing.com.

NOTES
