

Strategic Leadership Forum



Connecting the Asset and Wealth Management Community

TOC

SLF 2023 WRAP UP

The Nicsa SLF united professionals from all facets of the asset and wealth management industry, from product and distribution, to data and technology, and DEI. The conference has become a national stage for asset managers, broker dealers, and providers to collaborate on product trends, regulatory changes, and market developments.

- 2 C-SUITE FIRESIDE:**
 - Face the Membership
- 3 DEI:**
 - Financial Inclusion
- 4 PRODUCT & DISTRIBUTION:**
 - Rethinking Pipelines
- 5 TECHNOLOGY:**
 - Financial Services in the Metaverse
- 6 KEYNOTES:**
 - Mark Giuliano
 - David Kelly
 - Ryan Leak
- 8 PLUS MORE ON:**
 - Disruption Revisited
 - Intelligent Automation
 - Views from the Boardroom
- 9 NICSA GIVES BACK HIGHLIGHTS**

FACE THE MEMBERSHIP

In our most anticipated annual session, CNBC's **Tyler Mathisen** asked our panelists to share perspectives on the top issues facing C-Suite executives in the asset and wealth management industry. **BlackRock, Capital Group, and Edward Jones** set the stage at the 2023 SLF.



"We want our financial advisors to provide what clients are craving, and what they're craving is not just the well-allocated portfolio of the past."

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FINANCIAL INCLUSION

What is our responsibility as an industry to close the savings/investment gap? What are firms doing to increase inclusivity and expand their client bases? Forward-looking industry leaders are focusing on community activity to increase financial literacy, influence savings and investment behavior, and build trust with historically underserved communities.

Learn more from **New York Life, EVERFI, UBS and EY**

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RETHINKING PIPELINES

Each year, market intelligence provider **Cerulli Associates** surveys more than 10,000 affluent investors to identify investment product development trends. Attendees of Nicsa's Strategic Leadership Forum were given valuable takeaways from this research, as well as strategic insight into demand, distribution, and innovation across packaged investment vehicles. **Ameriprise Financial Services, Bank of America/Merrill Lynch, and BlackRock** weighed in.

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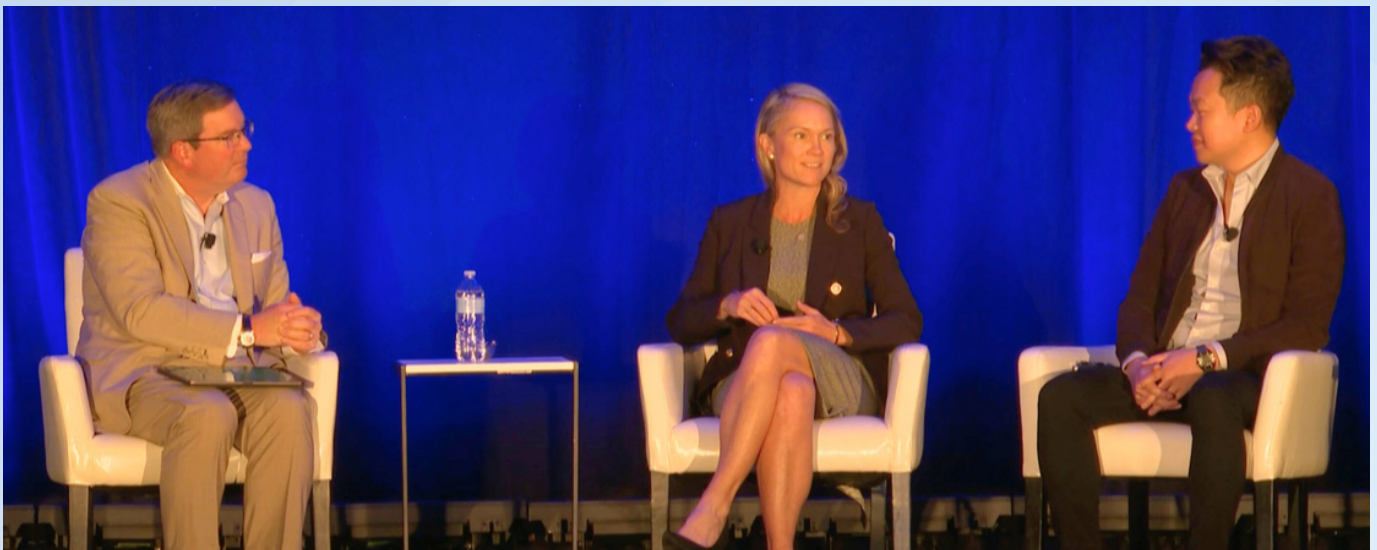


FINANCIAL SERVICES IN THE METAVERSE

What is the metaverse and how will it affect employees, products, and services in the future? Technology experts from **PwC** and **Citi** provided insights on how other industries are leveraging the metaverse and what may be in store for the global asset and wealth management industry.

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KEYNOTES

MARK GIULIANO

**Senior Managing Director and Chief
Administrative Officer, Invesco**

With extensive experience in overseeing Technology, Investment Services, Global Security, North American Transfer Agency, Hyderabad Operations, Global Strategic Intelligence, Enterprise Services, Enterprise Data, and Internal Consulting, Mr. Giuliano provided insights on the state of the industry.

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RYAN LEAK

**Author, Speaker, Executive
Coach, and Filmmaker**

“What would I do, if I knew I could not fail?” Ryan shared the blueprint for Chasing Failure, rather than running from it, and ultimately achieving your biggest goals and dreams.

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DR. DAVID KELLY

**Chief Global Strategist,
J.P. Morgan Asset Management**

With over 20 years of experience, Dr. Kelly provided valuable insight and perspective on the economy and markets to the institutional investor and financial advisor global communities.

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PLUS MORE ON

DISRUPTION REVISITED

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Predictions and views on technology evolution, ecosystem disruption, and the workforce of the future:
Casey Quirk, Fidelity Investments, Northern Trust, STP Investment Services.

INTELLIGENT AUTOMATION

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How to leverage technologies to gain efficiencies in their organizations:
BlackRock, BNY Mellon, Citi, and SS&C.

VIEWS FROM THE BOARDROOM

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How to make a successful transition onto Fund boards at top asset management firms, provide governance, and increase value for fund shareholders: **Mutual Fund Directors Forum, and Board members from Bridge Builder Funds, Morningstar Funds, and Symmetry Panoramic Funds.**

NICSA GIVES BACK

Nicsa Gives Back is an initiative that gives Nicsa members and attendees an opportunity to give back to the industry and to local communities.

SLF has dedicated a portion of its conference to Nicsa Gives Back - an afternoon of philanthropic opportunities, networking, and fun.



VOLUNTEERS OF THE YEAR

Nicsa is pleased to recognize outstanding organizations and industry professionals that excel in the field of asset management by demonstrating exemplary leadership and innovation.

[READ VOLUNTEER OF THE YEAR
PRESS RELEASE](#)

