EXECUTIVE FORUM '18

SPEAKERS AGENDA TRAVEL RESOURCES REGISTER

18 DAYS 21 HOURS 14 MIN

DEBATE. INCUBATE. ACCELERATE.

MAY 6-9, 2018 | SCOTTSDALE, AZ

REGISTER NOW

Please join Fidelity Investments, industry icons, and leaders from across the wealth management landscape at the 2018 Executive Forum. This year we invite you to Debate. Incubate. Accelerate. Expect energetic exchanges, motivating experiences, and actionable takeaways to help your organization flourish.

DEBATE

This is where some of the brightest minds will come together to present, challenge, and exchange ideas to fuel meaningful change.

INCUBATE

To incubate is to be a catalyst. Whether in technology, business models, policy… EF '18 is the place for new ideas to grow and be realized.

ACCELERATE

Fast is the new normal. The key is having the insights and tools to make that acceleration responsible, sustainable, and scalable.

Want to see what's in store? Please take a moment to view the Executive Forum Agenda.

KEY SPEAKERS

CONDOLEEZZA RICE

United States Secretary of State (2005-2009); Denning Professor in Global Business and Economy, Stanford University

View Biography

LASZLO BOCK

CEO and Founder, Humu; Senior Vice President of People Operations, Google (2006 - 2016)

View Biography

ABIGAIL JOHNSON

Chairman and CEO, FMR, LLC

View Biography

DANIEL BURRUS

Futurist, Innovator, Author

View Biography

SHEENA IYENGAR

Inaugural S.T. Lee Professor of Business in the Management Division at Columbia Business School

View Biography

PLATON

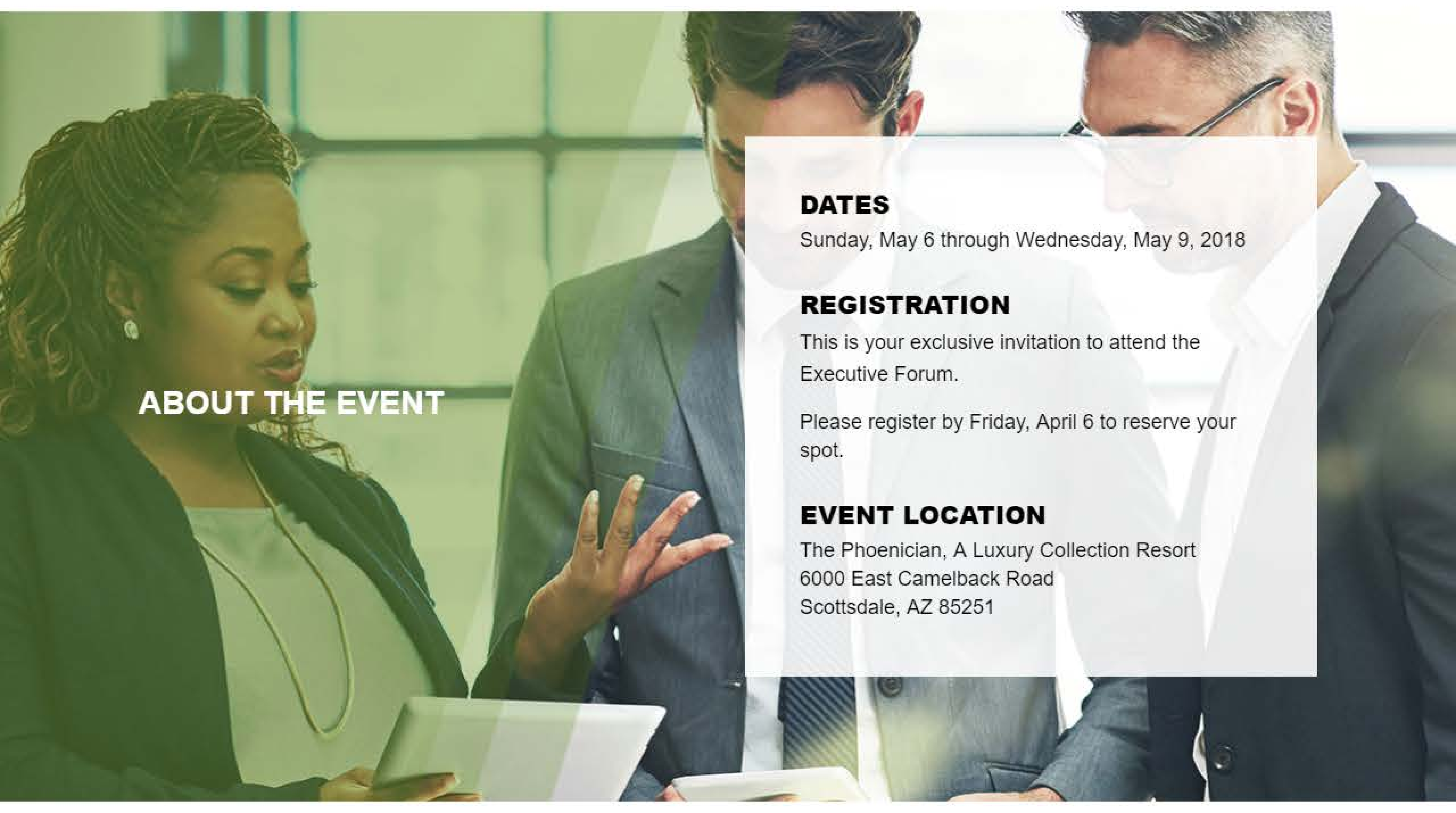
World-Renowned, Award-Winning Photographer, The New Yorker

View Biography

Please take a moment to view the full list of guest speakers.

SPACE IS LIMITED. RESERVE YOUR SPOT!

REGISTER NOW



ABOUT THE EVENT

DATES

Sunday, May 6 through Wednesday, May 9, 2018

REGISTRATION

This is your exclusive invitation to attend the Executive Forum.

Please register by Friday, April 6 to reserve your spot.

EVENT LOCATION

The Phoenician, A Luxury Collection Resort
6000 East Camelback Road
Scottsdale, AZ 85251

FOR EXECUTIVE ASSISTANTS

Are you an Executive Assistant helping with registration? For convenience, you may download a PDF of the agenda or the entire site using the buttons below:

DOWNLOAD PRINTABLE AGENDA

DOWNLOAD PRINTABLE WEBSITE

SPEAKERS

This year's event features a line-up of dynamic thought leaders from inside and outside of the financial services industry. Expect actionable take-aways that will help your organization thrive in a dynamic environment.

YOUR GUIDE AND MODERATOR

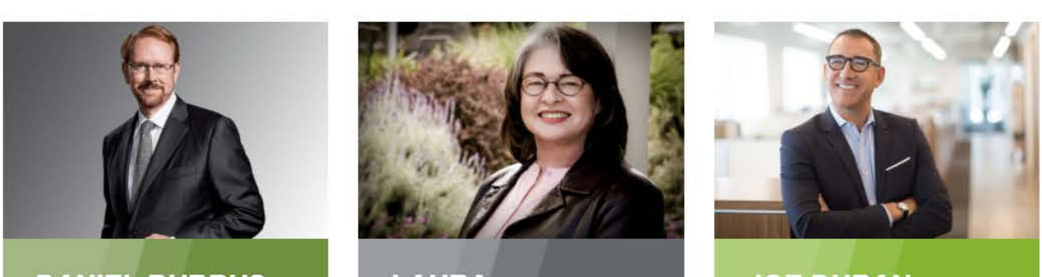
GUY RAZ
Award-Winning Reporter, Creator and host of three of the biggest radio programs and podcasts: TED Radio Hour, How I Built This, and the children's science program Wow in the World
View Biography

KEY SPEAKERS

MARK ALBERS
Founder, Albers & Associates Consulting
View Biography

DENIS ANSCOMB
CEO, Index.io
View Biography

JASON BARSEMA
Co-Founder and President, Halo Investing, Inc.
View Biography



PAUL BEGALA
Political Analyst & Commentator, CNN
View Biography

JEFF BISCHOFF
Founder and President, Old Greenwich Consultants
View Biography

LASZLO BOCK
CEO and Founder, Humu; Senior Vice President of People Operations, Google (2006 - 2016)
View Biography

DANIEL BURRUS
Futurist, Innovator, Author
View Biography

LAURA CARSTENSEN
Fairleigh S. Dickinson Jr. Professor in Public Policy, Professor of Psychology, Director, Stanford Center on Longevity
View Biography

JOE DURAN
CEO, United Capital
View Biography

STEWART GROSS
Managing Director, Lightyear Capital
View Biography

CHIP HEATH
Professor, Stanford Graduate School of Business, Best-Selling Author
View Biography

SALENE HITCHCOCK-GEAR
President, Prudential Advisors
View Biography

SHEENA IYENGAR
Inaugural S.T. Lee Professor of Business in the Management Division at Columbia Business School
View Biography

JAY LIPMAN
Co-Founder, Ethic
View Biography

RAJINI SUNDAR KODIALAM
Co-Founder, Focus Financial Partners
View Biography

RICHARD LAMPEN
President and CEO, Ladenburg Thalmann
View Biography

STEVEN LOCKSHIN
Founder and Principal, AdvicePeriod
View Biography

MICHAEL MURPHY
Political Strategist; Political Analyst, NBC News
View Biography

ED O'BRIEN
CEO, eMoney Advisor
View Biography

PLATON
World-Renowned, Award-Winning Photographer, The New Yorker
View Biography

CONDOLEEZZA RICE
United States Secretary of State (2005-2009); Denning Professor in Global Business and Economy, Stanford University
View Biography

DANNY RODRIGUEZ
Partner, Lee Equity Partners
View Biography

JON STEIN
Founder and CEO, Betterment
View Biography

TODD THOMSON
Co-Founder and Chairman, Dynasty Financial Partners
View Biography

JASE WILSON
Founder and CEO, Neighborly
View Biography

FIDELITY SPEAKERS

SEAN BELKA
Head of Fidelity Labs, Fidelity Investments
View Biography

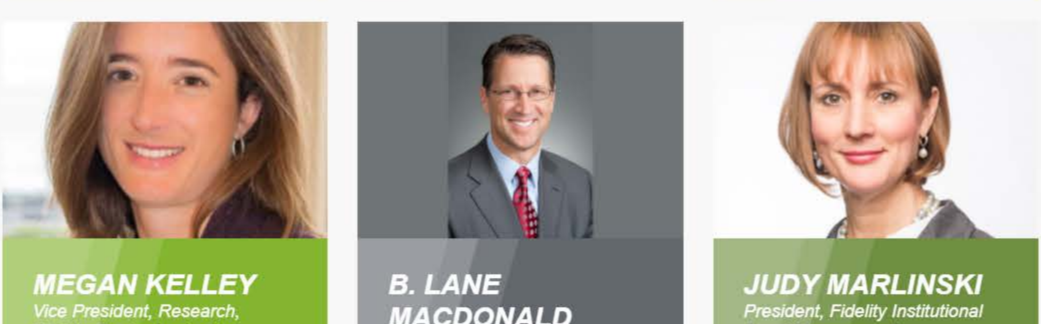
DAVID CANTER
Executive Vice President, Head of the RIA Segment, Fidelity Investments
View Biography

CAROLYN CLANCY
Executive Vice President, Head of Broker-Dealer Segment, Fidelity Investments
View Biography

BILL DOYLE
Senior Vice President, Research, Fidelity Center for Applied Technology
View Biography

MICHAEL DURBIN
President, Fidelity Institutional
View Biography

DIRK HOFSCHIRE
Senior Vice President, Global Asset Allocation
View Biography



BRIAN HOGAN
Head of Investment Product Solutions and Innovation, Fidelity Investments
View Biography

ABIGAIL JOHNSON
Chairman and CEO, FMR, LLC
View Biography

J.J. JOHNSON
Chief Communications Officer, Executive Vice President, Communications, Public Affairs
View Biography

MEGAN KELLEY
Vice President, Research, Fidelity Center for Applied Technology
View Biography

B. LANE MACDONALD
President and Chief Investment Officer, FMR Diversified Investments
View Biography

JUDY MARLINSKI
President, Fidelity Institutional Asset Management
View Biography

SANJIV MIRCHANDANI
President, Fidelity Clearing & Custody Solutions, Fidelity Investments
View Biography

CHARLIE MORRISON
President, Asset Management, Fidelity Investments
View Biography

COLBY PENZONE
Head of Investment Product, Fidelity Investments
View Biography

AMY PHILBROOK
Head of Diversity & Inclusion, Fidelity Investments
View Biography

CHAD RENFRO
Executive Vice President, Head of Cybersecurity, Fidelity Investments
View Biography

HADLEY STERN
Senior Vice President, Managing Director, Fidelity Investments
View Biography

JURRIEN TIMMER
Director of Global Macro, Fidelity Investments
View Biography

READY TO DEBATE, INCUBATE, AND ACCELERATE?

REGISTER NOW

AGENDA

This year, we're inviting you to Debate. Incubate. Accelerate. You can expect engaging exchanges, new experiences, and actionable take-aways that will help you and your organization thrive in today's dynamic environment. Check out the agenda filled with iconic figures, industry trailblazers and Fidelity thought leaders.

SUNDAY, MAY 6	MONDAY, MAY 7	TUESDAY, MAY 8	WEDNESDAY, MAY 9

11:00 AM – 6:00 PM

REGISTRATION
Please join us in the Camelback Ballroom Foyer to register for the meeting and check in to your guest room. Fidelity representatives will be on hand to help you download the app, answer questions, discuss the agenda, and assist with session selections.

6:00 PM

RECEPTION
East Lawn

7:00 PM

DINNER
Casita Lawn

*Please note agenda may be subject to change.

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SUNDAY, MAY 6 | **MONDAY, MAY 7** | TUESDAY, MAY 8 | WEDNESDAY, MAY 9

8:30 AM – 8:45 AM

WELCOME
Guy Raz, Award-Winning Reporter, Radio and Podcast Host

8:45 AM – 9:15 AM

A CONVERSATION WITH ABBY JOHNSON
Abby Johnson, Chairman and CEO, FMR, LLC
Abby Johnson shares her unique perspectives on the financial services industry and highlights key strategic initiatives that Fidelity is bringing to its customers.

9:15 AM – 10:05 AM

THE STATE OF THE WEALTH MANAGEMENT INDUSTRY
Mike Durbin, President, Fidelity Institutional
From the growing digital divide to changing investor perceptions of value, Mike Durbin sheds light on the trends, controversies, and potential within the wealth management industry.

10:15 AM – 10:45 AM

BREAK

10:45 AM – 11:45 AM

HOW TO WIN THE DIGITAL WAR?
Moderator: Sanjiv Mirchandani, President, Fidelity Clearing & Custody Solutions

- Joe Duran, CEO, United Capital
- Steven Lockshin, Founder and Principal, AdvicePeriod
- Ed O'Brien, CEO, eMoney Advisor
- Jon Stein, Founder and CEO, Betterment

Technology-enabled disruption is shaking up the industry and there's no turning back. This expert panel of digital leaders will explore the implications and opportunities. What are the winning models and what can firm leaders do to win against this evolving backdrop?

11:45 AM – 12:00 PM

CRYPTOCURRENCY: FUTURE OR FAD
Hadley Stern, Senior Vice President, Managing Director, Fidelity Center for Applied Technology
Proponents and skeptics have wildly divergent opinions about the promise of cryptocurrencies and the underlying Blockchain. Hear from Fidelity expert Hadley Stern who will help demystify this largely misunderstood topic, separating myths from facts and bringing clarity to how this technology can be used and its potential as an asset class.

12:00 PM – 1:15 PM

LUNCH

12:00 PM – 3:50 PM

FIDELITY INSTITUTIONAL ASSET MANAGEMENT DEDICATED MEETING
Download Fidelity Institutional Asset Management Agenda

1:15 PM – 2:15 PM

OWN THE THREAT: THE STATE OF CYBERSECURITY
Chad Renfro, Executive Vice President, Head of Cybersecurity, Fidelity Investments
As financial services companies, there's a big target on our collective back for cyber criminals. Can we be safe in a digital world? Chad Renfro says the odds are better with a vigilant and resilient approach. And he'll tell us how.

2:15 PM – 2:30 PM

TRANSFER TO IMMERSIVE SESSIONS

2:30 PM – 3:30 PM

IMMERSIVE SESSIONS
Attendees will participate in 1 of the 3 concurrent Immersive Sessions.

20/20 Vision: Advisor Talent Today and Tomorrow
Moderator: Carolyn Clancy, Executive Vice President, Head of Broker-Dealer Segment

- Mark Albers, Founder, Albers & Associates Consulting
- Jeff Bischoff, Founder and President, Old Greenwich Consultants
- Salene Hitchcock-Gear, President, Prudential Advisors
- Amy Philbrook, Head of Diversity and Inclusion, Fidelity Investments

By 2020, industry analysts project a 10,000 advisor shortfall. That's 2 years away! This panel of industry leaders explores what firms are doing to recruit, retain and grow the advisor force of the future, as well as the risks of not focusing on this critical topic.

Accelerating Growth: Capital Sources for the Wealth Management Industry
Moderator: David Canter, Executive Vice President, Head of the RIA Segment

- Stewart Gross, Managing Director, Lightyear Capital
- Rajini Sundar Kodialam, Co-Founder, Focus Financial Partners
- Richard Lampen, President and CEO, Ladenburg Thalmann
- Lane MacDonald, President and Chief Investment Officer, FMR Diversified Investments
- Danny Rodriguez, Partner, Lee Equity Partners
- Todd Thomson, Co-Founder and Chairman, Dynasty Financial Partners

Private equity and venture capital are flowing into the wealth management space. This panel of leaders will talk about the options that abound for leaders in search of capital: from self-funding to private equity to accessing public capital.

Macro-Research: 10 Mind-Blowing Charts
Jurrien Timmer, Director of Global Macro, Fidelity Investments
Known for sharing perspectives shaping the investment world, Jurrien brings you the 10 charts that will drive you to think in new ways against an ever-changing backdrop.

3:30 PM – 3:50 PM

BREAK

4:00 PM – 5:00 PM

VOICES FROM THE HILL
Moderator: Guy Raz, Award-Winning Reporter, Radio and Podcast Host

- Paul Begala, Political Analyst and Commentator, CNN
- J.J. Johnson, Chief Communications Officer, Executive Vice President, Communications, Public Affairs and Policy Group, Fidelity Investments
- Mike Murphy, Political Strategist and Analyst, NBC News

Voices from the left and the right join Fidelity's J.J. Johnson to frame the debates happening in Washington that may impact the financial services industry.

5:00 PM

DAY 1 CLOSING REMARKS
Guy Raz, Award-Winning Reporter, Radio and Podcast Host

6:00 PM

RECEPTION
Jokake Inn

7:00 PM

DINNER
Jokake Inn

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SUNDAY, MAY 6 | MONDAY, MAY 7 | **TUESDAY, MAY 8** | WEDNESDAY, MAY 9

8:30 AM – 9:30 AM

THE IMAGE OF LEADERSHIP
Platon, World-Renowned, Award-Winning Photographer, The New Yorker
Platon's intimate portraits of world and business leaders have brought him fame and insight. A gifted communicator, he brings those iconic images to life with inspiring behind-the-scenes stories about what makes a leader today.

9:30 AM – 9:35 AM

WELCOME BACK
Guy Raz, Award-Winning Reporter, Radio and Podcast Host

9:35 AM – 10:30 AM

FOSTERING A CULTURE OF INNOVATION
Laszlo Bock, CEO and Founder, Humu; Senior Vice President of People Operations, Google (2006 - 2016)
Laszlo Bock was the primary architect of Google's iconoclastic work culture. He has literally written the book (*Work Rules!: Insights from Inside Google That Will Transform How You Live and Lead*) on unlocking organizational innovation. He'll share his experience and take audience questions.

10:30 AM – 11:00 AM

BREAK

11:00 AM - 12:00 PM

BRIDGING THE GENERATIONAL GAP
Laura Carstensen, Fairleigh S. Dickinson Jr. Professor in Public Policy, Professor of Psychology, Director, Stanford Center on Longevity
Chances are, you have at least four generations in the workplace—Baby Boomers, Gen X, Gen Y, and Millennials (and maybe some Gen Z interns). What's a company to do?

12:00 PM - 1:15 PM

LUNCH

1:15 PM – 2:15 PM

IMMERSIVE SESSIONS
Attendees will participate in 1 of the 3 concurrent Immersive Sessions.

How to Incubate
Sean Belka, Head of Fidelity Labs, Fidelity Investments
The long-term success of any firm is contingent upon developing new products, growing revenue streams, and driving innovation. Sean will share the Fidelity Labs' playbook, which was designed to incubate new ideas for the business and will also reveal the journey of the Student Loan Incubator team.

The Art of Choosing
Sheena Iyengar, Inaugural S.T. Lee Professor of Business in the Management Division at Columbia Business School
Professor Iyengar studies how we make choices—and how we feel about the choices we make. She will share her groundbreaking research that has uncovered some surprising attitudes about our decisions.

FinTech Forecast
Moderated by: Megan Kelley, Vice President, Research, Fidelity Center for Applied Technology

- Denis Ascomb, CEO, Index
- Jason Barsema, Co-Founder and President, Halo Investing
- Jay Lipman, Co-Founder, Ethic
- Jase Wilson, Founder and CEO, Neighborly

Where are FinTech startups finding traction in asset management? Megan Kelley shares her perspectives on the landscape then introduces FinTech firms to pitch their visions and tell you how the game is changing.

2:15 PM – 2:45 PM

BREAK

2:45 PM – 3:35 PM

THE ANTICIPATORY ORGANIZATION: TURN DISRUPTION AND CHANGE INTO OPPORTUNITY AND ADVANTAGE
Daniel Burrus, Futurist, Innovator, Author
What if you could lead business growth with strategic foresight instead of hindsight? Daniel Burrus has created a framework for harnessing Anticipation—the ability to foresee growing problems, disruptions, and opportunities. He will share insights and practical tips for leaping ahead of your competition.

3:30 PM – 4:15 PM

THE POWER OF MOMENTS: WHY CERTAIN EXPERIENCES HAVE EXTRAORDINARY IMPACT
Chip Heath, Professor, Stanford Graduate School of Business, Best-Selling Author
The bestselling co-author of *Switch* and *Made to Stick*, Chip Heath explores why certain brief experiences can jolt, elevate, and change us—and how we can learn to create such extraordinary moments in our life and work.

4:15 PM – 5:15 PM

THE IMPACT OF ACCELERATING CHANGE: A GLOBAL PERSPECTIVE
Condoleezza Rice, United States Secretary of State (2005-2009); Denning Professor in Global Business and Economy, Stanford University
Dr. Condoleezza Rice, former Secretary of State and author of the new book *Democracy: Stories from the Long Road to Freedom*, discusses her latest book and shares her insights into today's global economy.

6:00 PM

RECEPTION
West Lawn

7:00 PM

DINNER
Main Pool Deck

*Please note agenda may be subject to change.

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SUNDAY, MAY 6 | MONDAY, MAY 7 | TUESDAY, MAY 8 | **WEDNESDAY, MAY 9**

7:00 AM

BREAKFAST & DEPARTURES

*Please note agenda may be subject to change.

REGISTER NOW

TRAVEL

The following information is designed to help you plan your stay in Scottsdale, Arizona. There is no registration fee for this event, although all attendees are responsible for payment of their own travel and lodging expenses.

EVENT LOCATION

The Phoenician, A Luxury Collection Resort
6000 E Camelback Rd.
Scottsdale, AZ 85251

The Phoenician is a distinctive luxury resort nestled in the heart of the beautiful and enchanting Scottsdale, Arizona. Having just completed a $140M top-to-bottom transformation, this property's refreshed style and uncompromising elegance are sure to be a perfect match for your Executive Forum experience.

RATE

Fidelity Investments has negotiated a special rate at The Phoenician of $325.00 per night for single or double occupancy (excluding taxes and service fees) for the Executive Forum. This rate is available to you two days prior to and two days following the program dates, based on availability.

To receive this special rate, please reserve your hotel room through this website. This is the only way to receive this room rate. Please do not contact the hotel directly.

Cancellations must be made no later than 72 hours prior to your scheduled arrival. Failure to notify Executive.Forum@fmr.com of your cancellation will result in a penalty charge of one night's room rate and tax to your credit card.

GUEST

You may bring one guest for a fee of $450.00, which will be charged to your hotel room bill. If your guest will not be attending any sessions or meals, there is no charge for the guest. The guest must be 21 years of age or older.

AIRPORT TRANSFERS

Round-trip ground transportation will be provided between the Phoenix Sky Harbor International Airport (PHX) and The Phoenician, for all meeting attendees, courtesy of Fidelity Investments. Please forward your travel itinerary to the Executive Forum Registration Support Desk at Executive.Forum@fmr.com by April 18 to ensure proper ground transfer arrangements.

ATTIRE

Business casual attire is appropriate for all sessions. We encourage you to dress in layers and bring a jacket/sweater as there will be both inside and outside activities.

Note that the average high temperature in Scottsdale, Arizona for early May is 90 and the average low is 63.

REGISTER NOW

EXECUTIVE FORUM '18

SPEAKERS AGENDA TRAVEL RESOURCES REGISTER

RESOURCES

Welcome to the Executive Forum Resource Center - your one stop source for information.

This page will be updated with speaker presentations, tools and resources after the event.

Fidelity INVESTMENTS

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