



EXECUTIVE FORUM '18

DEBATE. INCUBATE. ACCELERATE.



MEETING AGENDA

Sunday, May 6, 2018

TIME	ACTIVITY	LOCATION
6:00 p.m.	Reception	East Lawn
7:00 p.m.	Dinner	Casita Lawn

Monday, May 7, 2018

TIME	ACTIVITY	LOCATION
7:30 a.m.	Breakfast Available	East Patio
8:30 a.m.	Welcome Guy Raz, Award-Winning Reporter, Radio and Podcast Host	Phoenician Ballroom
8:45 a.m.	A Conversation with Abby Johnson Abby Johnson, Chairman and CEO, FMR, LLC	Phoenician Ballroom
9:15 a.m.	The State of the Wealth Management Industry Mike Durbin, President, Fidelity Institutional	Phoenician Ballroom
10:15 a.m.	Break	Ballroom Foyer
10:45 a.m.	How to Win the Digital War Joe Duran, CEO, United Capital Steven Lockshin, Founder and Principal, AdvicePeriod Ed O'Brien, Chief Executive Officer, eMoney Advisor Jon Stein, Founder and CEO, Betterment Moderated by Sanjiv Mirchandani, President, Fidelity Clearing & Custody Solutions	Phoenician Ballroom
11:45 a.m.	Cryptocurrency: Future or Fad Hadley Stern, Senior Vice President, Managing Director, Fidelity Center for Applied Technology	Phoenician Ballroom
12:00 p.m.	Lunch	Camelback Ballroom
1:15 p.m.	Own the Threat: The State of Cybersecurity Chad Renfro, Executive Vice President, Head of Cybersecurity, Fidelity Investments	Phoenician Ballroom
2:15 p.m.	Transfer to Immersive Sessions	

2:30 p.m.	<p>Immersive Sessions <i>Attendees will participate in 1 of the 3 concurrent Immersive Sessions.</i></p> <p>20/20 Vision: Advisor Talent Today and Tomorrow 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 Moderated by Carolyn Clancy, Executive Vice President, Head of Broker-Dealer Segment</p>	Camelback H
	<p>Accelerating Growth: Capital Sources for the Wealth Management Industry Stewart Gross, Managing Director, Lightyear Capital Rajini Kodialam, Co-Founder & Managing Director, Focus Financial Partners Richard Lampen, President and Chief Executive Officer, Ladenburg Thalmann Lane MacDonald, President and CEO, FMR Diversified Investments Danny Rodriguez, Partner, Lee Equity Partners Todd Thomson, Co-Founder and Chairman, Dynasty Financial Partners Moderated by David Canter, Executive Vice President, Head of the RIA Segment</p>	Camelback N
	<p>Macro-Research: 10 Mind-Blowing Charts Jurrien Timmer, Director of Global Macro, Fidelity Investments</p>	Camelback M
3:30 p.m.	Break	Ballroom Foyer
4:00 p.m.	<p>Voices from The Hill 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 Moderated by Guy Raz, Award-Winning Reporter, Radio and Podcast Host</p>	Phoenician Ballroom
5:00 p.m.	<p>Day 1 Closing Remarks Guy Raz, Award-Winning Reporter, Radio and Podcast Host</p>	Phoenician Ballroom
6:00 p.m.	Reception	Jokake Inn
7:00 p.m.	Dinner	Jokake Inn

Tuesday, May 8, 2018

TIME	ACTIVITY	LOCATION
7:30 a.m.	Breakfast Available	East Patio
8:30 a.m.	The Image of Leadership Platon, World-Renowned, Award-Winning Photographer, The New Yorker	Phoenician Ballroom
9:30 a.m.	Welcome Back Guy Raz, Award-Winning Reporter, Radio and Podcast Host	Phoenician Ballroom
9:35 a.m.	Fostering a Culture of Innovation Laszlo Bock, CEO and Founder, Humu; Senior Vice President of People Operations, Google (2006-2016)	Phoenician Ballroom
10:30 a.m.	Break	
11:00 a.m.	Bridging the Generational Gap Laura Carstensen, Fairleigh S. Dickinson Jr. Professor in Public Policy, Professor of Psychology, Director, Stanford Center on Longevity	Phoenician Ballroom
12:00 p.m.	Lunch	Camelback Ballroom
1:15 p.m.	Immersive Sessions <i>Attendees will participate in 1 of the 3 concurrent Immersive Sessions.</i>	
	How to Incubate Sean Belka, Head of Fidelity Labs, Fidelity Investments	Camelback M
	The Art of Choosing Sheena Iyengar, Inaugural S.T. Lee Professor of Business in the Management Division at Columbia Business School	Camelback N
	FinTech Forecast Denis Anscomb, CEO, Index Jason Barsema, Co-Founder and President, Halo Investing Jay Lipman, Co-Founder, Ethic Jase Wilson, Founder and CEO, Neighborly Moderated by Megan Kelley, Vice President, Research, Fidelity Center for Applied Technology	Camelback H
2:15 p.m.	Break	Ballroom Foyer
2:45 p.m.	The Anticipatory Organization: Turn Disruption and Change into Opportunity and Advantage Daniel Burrus, Futurist, Innovator, Author	Phoenician Ballroom
3:30 p.m.	The Power of Moments: Why Certain Experiences Have Extraordinary Impact Chip Heath, Professor, Stanford Graduate School of Business, Best-Selling Author	Phoenician Ballroom
4:15 p.m.	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	Phoenician Ballroom
6:00 p.m.	Reception	West Lawn
7:00 p.m.	Dinner	Main Pool Deck

Wednesday, May 9, 2018

TIME	ACTIVITY	LOCATION
7:00 a.m.	Breakfast & Departures	East Patio

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11:45 a.m.	Bitcoin: Future or Fad Hadley Stern, Senior Vice President, Managing Director, Fidelity Center for Applied Technology	Phoenician Ballroom
12:00 p.m.	Lunch	Estrella Theatre
12:30 p.m.	Trends in the Institutional Marketplace Judy Marlinski, President, Fidelity Institutional Asset Management Charlie Morrison, President, Asset Management, Fidelity Investments	Estrella Theatre
1:00 p.m.	Transfer to General Session	
1:15 p.m.	Own the Threat: The State of Cybersecurity Chad Renfro, Executive Vice President, Head of Cybersecurity, Fidelity Investments	Phoenician Ballroom
2:15 p.m.	Transfer to Breakout	

2:30 p.m.	Innovation in Asset Management Brian Hogan, Head of Investment Solutions and Innovation Group, Fidelity Investments Colby Penzone, Head of Investment Product, Fidelity Investments	Estrella Theatre
3:10 p.m.	Global Economic Outlook Dirk Hofschire, Senior Vice President, Asset Allocation Research Team, Fidelity	Estrella Theatre
3:45 p.m.	Break and Transfer to General Session	Ballroom Foyer
4:00 p.m.	Voices from The Hill 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 Moderated by Guy Raz, Award-Winning Reporter, Radio and Podcast Host	Phoenician Ballroom
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