EXECUTIVE FORUM '18

DEBATE. INCUBATE. ACCELERATE.

Fidelity INVESTMENTS

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**	**Camelback Ballroom**
10:45 a.m.	**Who Will Win the Digital War?** Richard Blunck, Executive Vice President, Digital Distribution, Fidelity Investments Joe Duran, CEO, United Capital Steven Lockshin, Founder and Principal, AdvicePeriod Jon Stein, Founder and CEO, Betterment **Moderated by** Bill Doyle, Senior Vice President, Research, Fidelity Center for Applied Technology	**Phoenician Ballroom**
11:45 a.m.	**Bitcoin: Future or Fad** Hadley Stern, Senior Vice President, Managing Director, Fidelity Labs	**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.	**Immersive Sessions** *Attendees will participate in 1 of the 3 concurrent Immersive Sessions.*	
	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	**Camelback XX**
	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 CEO, Ladenburg Thalmann Lane MacDonald, President and Chief Investment Officer, FMR Diversified Investments Danny Rodriguez, Partner, Lee Equity Partners **Moderated by** David Canter, Executive Vice President, Head of the RIA Segment	**Camelback XX**
	Macro-Research: 10 Mind-Blowing Charts Jurrien Timmer, Director of Global Macro, Fidelity Investments	**Camelback XX**
3:30 p.m.	**Break**	**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**
5:00 p.m.	**Day 1 Closing Remarks** Guy Raz, Award-Winning Reporter, Radio and Podcast Host	**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** *Attendees will participate in 1 of the 3 concurrent Immersive Sessions.*	
	How to Incubate Sean Belka, Head of Fidelity Labs, Fidelity Investments	**Camelback XX**
	The Art of Choosing Sheena Iyengar, Inaugural S.T. Lee Professor of Business in the Management Division at Columbia Business School	**Camelback XX**
	FinTech Forecast Host: Megan Kelley, Vice President, Research, Fidelity Center for Applied Technology	**Camelback XX**
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 p.m.	**Breakfast & Departures**	**East Patio**

Monday, May 7, 2018

12:00 – 3:50	**Fidelity Institutional Asset Management Dedicated Meetings**	
12:00 – 1:05	**Welcome Luncheon: Debate. Incubate. Accelerate**	For businesses today, it is important to create an environment that encourages debate and generates new ideas that drive value and accelerate growth. Hear how Fidelity is embracing the debate to capitalize on trends in the institutional markets.
1:05 – 1:15	***Transition to General Session***	
1:15 – 2:15	**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 – 2:25	***Transition to Fidelity Institutional Asset Management Dedicated Meetings***	
2:25 – 3:05	**Fidelity Institutional Asset Management: Global Economic Outlook** *Dirk Hofschire, Senior Vice President, Asset Allocation Research Team*	After a year that provided a near-perfect backdrop of steady global growth, low inflation, and accommodative monetary policies, the first quarter of 2018 brought with it volatility that had been absent from the market landscape. This session will examine major themes in global financial markets and presents our investment outlook for the coming quarters. An analysis of both economic and geopolitical factors that will contribute to market activity will be discussed.
3:05 – 3:50	**Innovation in Asset Management** Judy Marlinksi, President, Fidelity Institutional Asset Management Charlie Morrison, President, Asset Management Brian Hogan, Head of Investment Solutions and Innovation Group	Like all industries, asset management is evolving. No longer do off the shelf investment products address all investor needs. Learn how Fidelity is thinking about the future of asset management and leveraging new technology in the investment process to better meet investor needs.
3:50 – 4:00	**Break and Rejoin Fidelity Institutional Executive Forum General Session**	

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