

DIGITAL COUNCIL

MARCH 8-9 | DENVER, CO

HOSTED BY JANUS



WEDNESDAY, MARCH 8

Marketing Roundtable

- 9:00 AM** | Welcome
Kimber Lintz, Director — MFEA
Dan Sondhelm, CEO — Sondhelm Partners & MFEA Marketing Council Sponsor
- 9:15 AM** | Opening Remarks
Bill Finnegan, Chief Marketing Officer — AMG Funds & Chair MFEA Marketing Council
- 9:30 AM** | **Roundtable Discussion**
This conversation will provide an intimate and interactive forum for marketing leaders to candidly discuss challenges, strategies, opportunities and issues fund marketers are currently facing. Discussion topics include outsourcing, marketing automation “remorse” and overall efficiency.
- 11:30 AM** | Adjourn

Digital Council — Day 1

- 1:00 PM** | Registration & Networking
- 1:30 PM** | **Welcome & Opening Remarks**
Kimber Lintz, Director — MFEA
Sean Hampton, Head of Marketing Technology — Janus & MFEA Digital Council Chair
- 1:45 PM** | **Are Your Digital Touchpoints Failing Your Customers... And Your Business?**
All too often, businesses invest in technology, but fail to connect it with the true needs of their customers. This disconnect leads to wasted time, money and frustration. Hear Dan Saltzman explain how taking a human-centered design approach helps companies discover unmet opportunities and build transformative customer experiences. You’ll walk away with action items that will help you build a process for putting your customers first.
Dan Saltzman, Vice President — Effective



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- 2:15 PM** **Asset Manager Road to Fast AUM Growth is Paved with Silicon**
Graig Norden will discuss the sea of change on how advisors will select financial providers in the future and a new scoring methodology (aptly named the “Freewheel Score”) which identifies asset management companies best positioned to take advantage of the digital-first marketing phenomenon.
Graig Norden, Founder & President — Freewheel Marketing
- 2:45 PM** **Digital First**
How does your firm adopt a digital first marketing and communications strategy? Hear what these companies have to say about what digital first means to them; why it better serves their customers; and, various stages of their journey to get there.
Moderator, Brian Melter, Managing Director — Boston Financial Data Services
Mike Croth, Vice President Digital Marketing — Matthews Asia
Kristen McCarthy, Vice President, Communications — Dodge & Cox
David Pitta, Chief Marketing Officer — BrightTALK
Lois Welsh, Senior Director — TIAA - Tuition Financing Inc.
- 3:45 PM** Break
- 4:00 PM** **Roundtable Discussion: The Shift to Digital First Marketing**
The group will continue discussions related to digital first marketing considerations, strategies and execution in this popular, open format. *Moderated by the MFEA Digital Council Steering Committee.*
- 5:00 PM** Adjourn
- 5:30 PM -** Reception & Networking
7:00 PM JW Marriott Denver Cherry Creek — Fireside & West Patio



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THURSDAY, MARCH 9

Digital Council — Day 2

8:30 AM Continental Breakfast & Networking

8:45 AM Welcome & Opening Remarks

Kimber Lintz, Director — MFEA

Brian Melter, Managing Director, E-Business Solutions Division — Boston Financial Data Services

9:00 AM **Content Management & Workflow Automation**

Learn more about the current trends and overall landscape of these two issues directly related to the critical focus on efficiency in 2017.

Moderator: **Gretchen Luebke**, Head of Marketing Operations — Janus

Harsh Choudhary, Chief Product Officer — Appatura

John Hazard, Vice President, Enterprise Services — Contently

9:45 AM **Innovations in Interactive Content**

What exactly is interactive content? Is it more expensive to create? If so, is it worth the extra time and cost to develop and publish it? Hear how interactive content has helped T. Rowe Price break through the noise, drive action and become more relevant.

Andy Seibert, Managing Partner — IMPRINT

Natalie Widdowson, Head of Content Marketing, Individual Investors — T. Rowe Price

10:15 AM Break

10:30 AM **Paid Opportunities and Social Advertising**

There has been large growth online ad revenue in recent years thanks in part to social advertising and other data-driven ad targeting platforms. Brands shifting toward this approach and away from traditional online banners have seen success in targeting niche audiences in cost-effective ways. Hear from experts who will break down this trend and offer best practices and advice on how to implement and execute a strategy of your own.

Moderator: **Scott Burke**, Digital Delivery Manager-Americas — Aberdeen Asset Management

Dave Neuman, Director of Social Strategy — Prime Visibility

Natalie Marin, Vice President of Public Relations & Head of Social Media — OppenheimerFunds

Andrew Stark, Senior Vice President — PulsePoint



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11:15 AM Break

11:30 AM **Executive Roundtable**

Box Lunch

This intimate, interactive format enables presenters and participants to candidly discuss topics ranging from the day's agenda to other critical business management issues.

1:00 PM Adjourn



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