

AGENDA

From Insight to Action: How AI-led Engineering is Creating the New Financial Management Frontier

Executive Dinner

SPEAKERS



Claudia Visini
Director
DTCC



Frederick Isleib
Global Head, ESG
Research & Integration
Manulife



SRAVAN KASARLA
Chief Data Officer
Commonwealth
Financial Network



Xiao Zhang
VP of Data Science
Fidelity Investments

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January 14, 2025

5:30 PM-9:00 PM
Eastern Time

From Insight to Action: How AI-led Engineering is Creating the New Wealth Management Frontier

This dynamic event will delve into how AI-accelerated innovation and agentic systems are transforming the industry. Discover how leading firms are leveraging AI to migrate legacy applications and systems faster, enhance client engagement, optimize operations, and drive predictive insights, all while navigating evolving regulatory landscapes. Engage with peers and industry visionaries to explore strategies for integrating cutting-edge AI technologies, accelerating digital transformation, and unlocking unprecedented value in a rapidly changing financial ecosystem.

