

# 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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**FROM INSIGHT TO ACTION: HOW AI-LED  
ENGINEERING IS CREATING THE NEW  
WEALTH MANAGEMENT FRONTIER**



**January 14, 2025**

5:30 PM-9:00 PM

Eastern Time

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.

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