

# AGENDA

## Innovating Financial Services Operations with VoiceAI Executive Dinner

### SPEAKERS



**Ashok Mehta**  
Global Head of Financing  
Data & AI  
UBS



**Ibrahim Jackson**  
Founder  
Ubiquitous Preferred Services



**Mudassir Ali**  
Director, Financial  
Algorithms Development  
Northwestern Mutual



**Prasanna Seshadri**  
SVP  
Citi



**Kanika Sharma**  
VP of Product  
Morgan Stanley

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**May 29, 2025**  
5:30 PM-9:00 PM  
Eastern Time

### Innovating Financial Services Operations with VoiceAI

Tech leaders have a split agenda when it comes to GenAI: Make the no-regret moves that can deliver value today while investing to build capabilities for the longer term. Voice AI agents are at the forefront of this, transforming service delivery by automating routine, high-volume customer interactions. This shift is turning traditionally manual, costly processes in contact centers into streamlined, scalable, and customer-first operations—achievable today.

Join us to explore the immediate impacts of VoiceAI and virtual assistants within the contact center, and how they set the stage for future innovations. We will discuss how these technologies ensure consistent quality, 24/7 service availability, and deliver new growth levers while also laying the groundwork for a hybrid AI and human workforce, giving your firm ongoing customer loyalty and a competitive advantage.

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