



FEBRUARY 13-14, 2024 | NEW YORK CITY

CDAO **Financial Services**



▶ Connecting you to what's next in data

Confirmed Speakers:

JoAnn Stonier, Fellow of Data & AI, Former Chief Data Officer **MASTERCARD**

Mark Birkhead, Chief Data Officer **J.P. MORGAN CHASE & CO**

Edgar Zalite, Chief Data Architect – Americas **DEUTSCHE BANK**

Srikanth Doraiswamy, Chief Data & Analytics Officer **CITY NATIONAL BANK**

Vishal Patel, Chief Data and Analytics Officer **WEBSTER BANK**

Tarun Sood, Chief Data Officer, **AMERICAN CENTURY**

Heidi Lanford, Chief Data Officer (*Former*), **FITCH GROUP**

Srini Masanam, Global Head of Surveillance Data Quality, **CITI**

Dennis Peters, Head of Data & Analytics **PGIM**

Andrea Stefanucci, Executive Director, Artificial Intelligence Lab, **J.P. MORGAN CHASE & CO**

Amy Oldenburg, Managing Director, Investment Management **MORGAN STANLEY**

Julia Bardmesser, Chair, Technology Advisory Council **WOMEN LEADERS IN DATA (WLDA)**

Dan Power, Managing Director and Business Unit Chief Data Officer **STATE STREET GLOBAL MARKETS**
(*former*)

Jennifer Mezzio, Global Data Officer **SILICON VALLEY BANK**

Lei Cheng, Data Science Manager **BLUE CROSS & BLUE SHIELD OF RHODE ISLAND**

Jen Courant, Head of Technology, Data and Innovation, **DEUTSCHE BANK**

Murali K. Nandigama, Senior Executive Director, Asset & Wealth Management, **J.P. MORGAN CHASE**

Chandra Kapireddy, Managing Director, Head of Product Risk, AI/ML Solutions & Model Delivery Services
J.P. MORGAN

Prathibha Prabakaran, Head of Enterprise Data Architecture **VOYA FINANCIAL**

Diego Arago, Senior Vice President, Balance Sheet Management & Analytics **CITI**

Ercan Ucak, Vice President **CERBERUS CAPITAL MANAGEMENT**

Hardik Dave, Director, Digital & Data Platforms **BLACKROCK**

Igor Velentim dos Santos, Head of Data & Analytics **IDB INVEST**

Shariq Ali, Lead Developer, **MEDICI.AI**

Aamina Bawany, Chief Operating Officer, **MEDICI.AI**

A Zin Oo, Senior Vice President, Enterprise Data Master, Client Data Solutions **BNY MELLON**

Sreevani Konda, Director, Data Analytics & Governance, **FIDELITY INVESTMENTS**

Amy Silino, Director, Digital & Ecommerce **CERBERUS CAPITAL MANAGEMENT (Former)**

Jasmeet Singh Bhatia, Vice President, Strategy and Product Analytics, **TRUIST**

Erica Pan, Product Owner, Micro FICC e-Trading Data Strategy, **BANK OF AMERICA MERRILL LYNCH**

Arijit Bhattacharya, Head of Data Governance, **NORTHERN TRUST ASSET MANAGEMENT**

Jake Katz, Head of RMBS Research and Data Science, Analytics & AI, **LONDON STOCK EXCHANGE GROUP (LSEG)**

<i>Day One</i>	
08:00	<i>Registration & Coffee in the Exhibition Area</i>
	<i>Tricentis seat drop out in both tracks</i>
08:40	<i>Chair's Opening Remarks</i>
08:50	<p>Panel Discussion: Can you keep up with the rapid digital transformation and data developments?</p> <ul style="list-style-type: none"> - How can you gain, and maintain buy in from those horizontal and vertical to you? - What are the key principles to driving a culture of data? Do these really work? - How to effectively navigate people process and change management as part of your data strategy - What does good engineering, infrastructure and architecture look like in your enterprise? - Designing and delivering data governance and analytics capabilities in line with business goals <p><i>Panelists:</i> Tarun Sood, Chief Data Officer AMERICAN CENTURY Dan Power, Managing Director and Business Unit Chief Data Officer STATE STREET GLOBAL MARKETS <i>(former)</i> Vishal Patel, Chief Data and Analytics Officer WEBSTER BANK Igor Valentim Dos Santos, Head of Data & Analytics IDB INVEST Amy Silino, Director, Digital & Ecommerce CERBERUS CAPITAL MANAGEMENT <i>(Former)</i> A Zin Oo, Senior Vice President, Enterprise Data Master, Client Data Solutions BNY MELLON</p>
09:35	<p>Mastering the Data and AI Revolution: A Practical Blueprint for Data and AI Innovation in Financial Services</p> <p>This presentation is specifically designed for leaders, architects, developers, and business executives specializing in data, analytics, AI, and machine learning within the financial sector. It presents a practical and stimulating blueprint for the effective development of data and AI products and platforms within their organizations.</p> <p>The discussion will focus on cutting-edge methods to improve decision-making and operational efficiency through data-driven insights, while ensuring scalability, compliance, security, and substantial business value. The aim of this session is not only to educate but also to invigorate attendees, equipping them with the necessary tools and concepts to adeptly navigate the intricate world of AI and data analytics in the rapidly transforming financial industry.</p> <p>Chandra Kapireddy, Managing Director, Head of Product Risk's AI/ML Solutions & Model Delivery Services J.P. MORGAN CHASE</p>
10:05	<p>Panel Discussion: Trust in GenAI: How monitoring and governance is the key to lasting value from GenAI</p> <ul style="list-style-type: none"> - Exploring strategies for implementing the right governance to maintain integrity and confidentiality of data - Uncover how organizations can harness generative AI to generate novel ideas, prototypes, and insights, ultimately driving innovation and competitive advantage - Discuss the potential of generative models to create realistic synthetic data - Promoting explainability and transparency in AI systems empowers to provide clear insights into how AI models make decisions, enhancing trust, and facilitating better understanding of AI-generated outcomes <p>Ivan Fernandez, Head of Cloud Payments and FinTech Ecosystems, Google</p>

	<p>Ray Mi, RVP of Applied AI Experts, DataRobot</p> <p>Scott Munson, VP of AI, Evolutio</p> <p>Diego de Aragao, Senior Vice President, Balance Sheet Management & Analytics CITI</p>	
10:35	<p><i>Mid-Morning Coffee & Networking in the Exhibition Area</i></p>	
11:05	<p>Discussion group A: A 360 view of your customer – understanding the customer journey.</p> <ul style="list-style-type: none"> - Understanding where to access data and how this can benefit your enterprise in order to remain competitive and improve consumer outcomes - What can data tell you about your customers? - Driving value from data through mining internal and external data - Using data to monitor market trends, competitor activities and customer sentiment to identify opportunities and threats <p>Jasmeet Singh Bhatia, Vice President, Strategy and Product Analytics, TRUIST</p> <p>Ercan Ucak, Vice President CERBERUS CAPITAL MANAGEMENT</p> <p>Dennis Peters, Head of Data & Analytics PGIM Senior Representative</p> <p>Moderated by: TK Kurian, Senior Director of Strategy, Treasure Data</p>	<p>Discussion group B: Creating an MDM Strategy</p> <p>In any financial institution, data is the foundation that drives informed business decisions, customer insights, regulatory compliance, and more. But to do this effectively, data teams need to ensure <i>accurate</i> master data is readily available for business leaders and teams.</p> <p>This is when Master Data Management plays a critical role in organizations capturing a single source of truth (or golden record) to ensure the quality and accuracy of all master data. With the correct people, processes, culture, and technologies in place, financial organizations can unlock the potential of their data.</p> <p>This session will explore:</p> <ul style="list-style-type: none"> • Creating an MDM strategy • Identifying successes and/or challenges of an MDM implementation • The benefits of creating a data-centric organization • Real-life use cases from firms who have adopted MDM <p>A Zin Oo, Senior Vice President, Enterprise Data Master, Client Data Solutions BNY MELLON</p> <p>Scott Moore, Director of Pre-Sales, SEMARCHY</p>
11:45	<p>Empowering Finance: Unleashing the Power of Data Integrity in AI/ML Portfolio Development</p> <p>In the dynamic landscape of finance and banking services, where data is the foundation for intelligent decision-making, the need for unwavering trust in data integrity has never been more critical. Financial institutions grapple with massive volumes of complex data, and the accuracy and reliability of this information directly influences strategic initiatives, risk management, and regulatory compliance – especially when digital transformation, mergers, and acquisitions are the norm. The consequences of inaccurate or inconsistent data can cause downstream issues through an organization, eroding stakeholder confidence, exposing vulnerabilities, and jeopardizing the very foundation on which financial institutions operate.</p> <ul style="list-style-type: none"> • The importance of data integrity in finance and overview how to unlock the full potential of your AI/ML initiatives in order to fortify the trust in your organization's data foundation. • Introduce the complex process of building a resilient and trustworthy data ecosystem. • Preview a few real-world challenges and use cases from large banks and financial institutions. 	

	<ul style="list-style-type: none"> How leading financial institutions globally can start down the path to have confidence in their data-driven endeavors. <p>Curtis O'Dell, Global Business Director for Data Integrity, TRICENTIS</p>
12:15	<p>Investment in Data Literacy is Priceless ... So Don't Put a Price on It!</p> <p>In this session, we will focus on the importance of data literacy initiatives, strategies for implementing successful programs, and how to create adoption and expected outcomes. Designed for leaders who are considering or are in the process of implementing one, this session will bolster your efforts through shared practical experiences of recently sponsored data literacy initiatives.</p> <p>Heidi Lanford, Chief Data Officer (<i>Former</i>)</p> <p>Fitch Group</p>
12:45	<p><i>Lunch & Networking in the Exhibition Area - Lunch & Networking in the Exhibition Area</i></p> <p><i>Taipy Seat Drop out in both tracks.</i></p>
13:30	<p>Efficiently scale and manage your Data / ML workflow with Taipy</p> <p><i>From Data and AI algorithms into production-ready web applications.</i></p> <p><i>Discover Taipy an open-source Python library for easy, end-to-end application development, featuring what-if analyses, smart pipeline execution, built-in scheduling, and deployment tools.</i></p> <p><i>In this talk, participants will discover how to:</i></p> <ul style="list-style-type: none"> Model dataflows, orchestrate pipelines, and manage scenarios (which are pipeline executions) through the development of an application backend Develop an interactive and customizable multiple-page dashboard without knowing HTML, JS, and CSS by using a simple syntax and make it in a few lines of code Create and manage scenarios through a robust pipeline graphical editor <p><i>With Taipy, transform simple pilots into production-ready end-user applications in no time with the most powerful Python front-end and back-end stack.</i></p> <p>Vincent Gosselin, CEO, TAIPY</p>
14:15	<p>Implementing Data Mesh for Modern Financial Services Workloads</p> <p>Data mesh is increasingly popular as organizations recognize the limitations of traditional centralized data architectures, and the benefits of decentralized, domain-driven approaches. To maximize data's value in the fast-paced, highly regulated financial services industry, data and analytics leaders need to provide self-service access across the data mesh, while maintaining strong, consistent security.</p> <p>In this session, we'll explore:</p> <ul style="list-style-type: none"> How leading organizations enable decentralization and self-service data products in highly regulated industries The importance of federated governance for security and collaboration within a data mesh Considerations for data product discovery and access flows that can improve efficiency and insights <p>Matt Vogt, VP, Global Solutions Architecture, Immuta</p>
	<p>Track A</p>
	<p>Track B</p>
14:45	<p>Harnessing Client & Prospect Data to Propel Growth in Asset Management</p>

	<p>Every business’s overall goal is growth. To do this, it is essential for financial services to keep up with shifting client preferences and harness the benefits of advanced analytics, machine learning, natural language models and artificial intelligence to make client led data decisions.</p> <p>How to capitalize on your asset management client & prospect data for growth Transforming data into insights that can benefit multiple stake holders What does your client and prospect data tell you about the future of your enterprise Building a large language model in house – understanding the benefits of GPT 4 to aid with data led decision making Building rich stories with your data to inform stakeholders and drive business outcomes Dennis Peters, Head of Data & analytics PGIM</p>
15:15	<i>Afternoon Coffee & Networking in the Exhibition Area</i>
5:45	<p>Navigating the new world of Data governance, quality and ESG</p> <p>With the maturity of data organizations, we should look to what data governance is relevant and what matters for the business. Establishing a robust framework is the key to governance and quality management. Fostering a data culture in the organization helps navigate regulatory needs, mitigates risks as well as protects privacy. In the end, data should empower the business with specific use cases like ESG for quick and explainable decision-making.</p> <p>Arijit Bhattacharya, Head of Data Governance Northern Trust Asset Management</p>
16:15	<p>Panel Discussion: Enabling safe uses for AI in order to leverage its outcomes</p> <ul style="list-style-type: none"> - Are we able to keep up with the advancements of AI? - Aligning AI uses with the business strategy - Ensuring your governance strategy includes AI and ML and is accurate and effective - How can we ensure that our consumers engagements with AI are safe? - Understanding how the implications of different generations and how they see the future of AI in finance - How to navigate privacy and security concerns as well as trust when using AI? - How are you leveraging safe uses of AI at your enterprise? <p><i>Panelists:</i> Julia Bardmesser, Chair, Technology Advisory Council WOMEN LEADERS IN DATA (WLDA) Ercan Ucak, Vice President CERBERUS CAPITAL MANAGEMENT Lei Cheng, Data Science Manager Blue Cross & Blue Shield of Rhode Island Jake Katz, Head of RMBS Research and Data Science, Analytics & AI, LONDON STOCK EXCHANGE GROUP (LSEG) Eric Szuhany, Solutions Architect, WRITER</p>
17:00	<i>Chair’s Closing Remarks & End of Day One</i>
17:00 – 18:00	<i>Cocktail Reception & Networking</i>

	<i>Day Two</i>
08:00	<i>Coffee & Breakfast in the Exhibition Area</i>
08:40	<i>Chair's Opening Remarks</i>
08:50	<p>Panel Discussion: The transformative impact of blockchain technology to generate new revenue, deliver process efficiency and improve consumer experience</p> <p>Learn how blockchain can reduce enterprises dependency on costly intermediaries whilst enhancing customer experience and allowing for greater efficiencies in their middle and back office processes</p> <ul style="list-style-type: none"> - How blockchain-based financial systems will not replace traditional financial intermediaries but coexist or integrate with them - Integrating blockchain technology into your business model - Understanding the factors driving the growth of blockchain technology in the financial industry - Utilizing blockchain technology to remain innovative - Decentralized finance is becoming more established in the financial services sector, what does this mean for your enterprise? <p><i>Panelists:</i> Amy Oldenburg, Managing Director, Investment Management MORGAN STANLEY Diego De Aragao, Senior Vice President, Balance Sheet Management & Analytics CITI Shariq Ali, Lead Developer, MEDICI.AI Aamina Bawany, Chief Operating Officer, MEDICI.AI</p>
09:35	<p>Embedding responsible practices in organizational culture, building capacity and literacy for responsible uses of AI</p> <ul style="list-style-type: none"> - Navigating your security and privacy obligations when using AI - How to manage the risks of AI in a rapidly changing landscape in order to remain safe, but innovative - How to keep bias out of data to ensure fair and ethical AI - Ethics from the top down. Your commitment as a leader <p>JoAnn Stonier, Fellow of Data & AI, Former Chief Data Officer MASTERCARD</p>
10:05	<p>Fireside chat: Data security is everyone's responsibility in order to remain proactive</p> <ul style="list-style-type: none"> - Innovative ways to bridge the gap between data and cyber security - Addressing some of the challenges that may arise and looking to the future - Improving data security through risk management, policies, and standards - Understanding the importance of data security awareness at all levels of an organization. - Encouraging a culture of accountability where every employee takes ownership of protecting sensitive data. - Emphasizing the role of individuals in identifying and addressing security vulnerabilities before they escalate. - Recognizing that data security is not solely the responsibility of the IT department, but requires collective effort across all departments. - Highlighting real-world examples and case studies to illustrate the impact of individual actions on overall data security. <p><i>Panelists:</i> Srini Masanam, Global Head of Surveillance Data Quality, CITI Jennifer Mezzio, Global Data Officer SILICON VALLEY BANK</p>
10:35	<i>Mid-Morning Coffee & Networking in the Exhibition Area</i>
11:05	<p>Leveraging the link between your data strategy and business strategy</p> <ul style="list-style-type: none"> - What is your data strategy? What is your business strategy? How do they link up?

	<ul style="list-style-type: none"> - How to create the next version of your data strategy to be inline with the business strategy and corporate goals - Democratizing access to data, improving management and data fluency to meet the goals of the business - Incorporating and leveraging AI into your Data Strategy <p>Mark Birkhead, Chief Data Officer J.P. MORGAN CHASE & CO</p>
11:35	<p>My story – The journey of the Chief Data Officer <i>In this session, you will hear from some of the sector’s highest leaders, hear how they started in the sector and made their way up to be a Chief Data Officer. You’ll have the opportunity to ask your burning questions, have robust discussions and gain insights into what makes a great leader and what the future of the CDO looks like.</i></p> <p>JoAnn Stonier, Fellow of Data & AI, Former Chief Data Officer MASTERCARD Tarun Sood, Chief Data Officer, AMERICAN CENTURY Heidi Lanford, Chief Data Officer (Former), FITCH GROUP Julia Bardmesser, Chair, Technology Advisory Council WOMEN LEADERS IN DATA (WLDA)</p>
12:20	<p><i>Lunch & Networking in the Exhibition Area</i></p>
13:20	<p>Panel: The impact of digital transformation on data governance; how to remain agile and ensure your data governance strategy is amended to suit <i>This session will delve into the realm of data governance within digital transformation, shedding light on the strategies, best practices, and regulatory considerations that are essential for success in the financial services sector.</i></p> <ul style="list-style-type: none"> - Ensuring your data governance strategy and framework reflects the current and evolving data landscape - How does digital transformation impact your data governance strategy? - How to improve your strategy to ensure it doesn’t hinder your enterprises ability to transform with the sector - Understanding the key foundations and best practice of a good data governance strategy to remain agile - Strategies for ensuring data quality, security and compliance within digital transformation - Emerging technologies for data governance <p>Jennifer Mezzio, Global Data Officer SILICON VALLEY BANK Dan Power, Managing Director and Business Unit Chief Data Officer STATE STREET GLOBAL MARKETS (former) Prathibha Prabakaran, Head of Enterprise Data Architecture VOYA FINANCIAL (former)</p>
14:00	<p>Navigating policy and compliance to remain innovative Insights into the 2.5-year journey at Citi in the transformation of the data function at the firm exiting regulatory consent order using innovative tools including AI/ML</p> <ul style="list-style-type: none"> - Building on the groundwork of data and analytics for regulatory compliance to drive value across the enterprise - The importance of undertaking risk assessment and account for risk management in order to remain innovative - Has your data governance strategy accounted for effective risk management? Policy and compliance are everyone’s responsibility - The benefits of Fintech companies in order to remain competitive and navigate the regulatory landscape <p>Srini Masanam, Global Head of Surveillance Data Quality, CITI</p>

14:30	Effective data management to drive digital transformation <ul style="list-style-type: none">- Understanding how data management impact customer satisfaction and business growth. How can this be leveraged?- How can data warehouses, data lakes, the cloud and advanced analytics tools can improve data management?- Meeting regulatory compliances and privacy laws- The future of data management in an increasingly digital world- Best practice and strategies for data resilience Jen Courant Head of Technology, Data and Innovation, DEUTSCHE BANK
15:00	End of Conference