

CDAO Financial Services & Insurance



▶ Connecting you to what's next in data

		Day Two
8:00	<i>Registration & Coffee in the Exhibition Area</i>	
8:55	FINANCIAL SERVICES	INSURANCE
9:00	<p>PANEL DISCUSSION: 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>Robert Kula, EVP & Chief Data Risk Officer, KEYBANK Saba Dossani, Chief Data & Analytics Officer, COMERICA BANK Pawan Verma, Chief Data Officer, INDUSTRIAL AND COMMERCIAL BANK OF CHINA</p> <p>Moderator: Colman Madden, Head of Customer Engineering, GOOGLE CLOUD</p>	<p>PANEL DISCUSSION: The Future of Data-Driven Insurance: What's Next?</p> <ul style="list-style-type: none"> ○ Explore emerging trends in AI, machine learning, and data analytics reshaping the insurance industry. ○ Ensuring data quality and accuracy in AI-driven environments. ○ Aligning your data strategy with your business strategy <p>Aishwarya Ashok, Senior Data Scientist, PURE INSURANCE Daniel Chen, Senior Data Scientist, THE HARTFORD & ADJUNCT FACULTY AT COLUMBIA UNIVERSITY Sujata Sachdev, Senior Data Governance Analyst, ASPEN Tim Yang, Director, AI/ML Transformation, UNUM</p> <p>Moderator: Jeremy Epstein, Venture Capital Senior Analyst, AMERICAN FAMILY VENTURES</p>
9:45	<p>Unlocking Trust in Data for Effective Risk Management in Fraud Detection with AI <i>In today's fast-paced financial landscape, reliable data is the backbone of informed decision-making, and Artificial Intelligence (AI) is revolutionizing the way financial institutions approach risk management. As</i></p>	<p>AI-Powered Underwriting: From Risk to Reward</p> <ul style="list-style-type: none"> ○ How insurers are leveraging AI to improve underwriting accuracy, efficiency, and speed. ○ Case studies of AI implementation reducing costs and improving risk assessment. <p>Jason Wang, Chief Risk Officer & Vice President, Data Analytics, ALLSTATE INSURANCE COMPANY OF CANADA</p>

	<p><i>financial institutions navigate vast amounts of complex data, ensuring its accuracy and integrity is crucial for strategic initiatives, risk management, and regulatory compliance.</i></p> <p><i>Join Curtis O'Dell, Global Business Director for Data Integrity, as he delves into the critical relationship between data integrity and the success of AI and ML initiatives in finance. This session will explore:</i></p> <ul style="list-style-type: none"> <i>• The importance of data integrity in finance and its impact on AI/ML initiatives</i> <i>• Building a resilient and trustworthy data testing system for AI success</i> <i>• Real-world challenges and success stories from enterprises that have achieved AI-driven results with high-quality data</i> <i>• Strategies for leading financial institutions to confidently leverage data-driven risk management for AI-powered fraud detection</i> <i>• How maintaining data for the financial sector is crucial in providing an auditable, compliant, and rigorous approach to managing data, conversions, and mergers.</i> <p><i>Don't miss this opportunity to learn how to cultivate unwavering trust in your data and unlock the full potential of your AI/ML initiatives.</i></p> <p>Curtis O'Dell, Global Business Manager, TRICENTIS</p>	
<p>10:15</p>	<p>Enhancing Customer Experience Using LLMs</p> <ul style="list-style-type: none"> ○ Applied patterns using LLM to create personalized customer experience ○ AI-driven chatbots and virtual assistants for improved customer service 	<p>Transforming Claims using No-Code Automation and AI</p> <ul style="list-style-type: none"> ○ How automation and AI are speeding up the claims process and reducing errors. ○ Understanding why AI and No-Code are changing the way organizations are transforming their Business Application Landscape

	Koosha Golmohammadi, PhD, Executive Director of Data Science, CHASE	Jason Miller, Chief Evangelist & Principal Consultant, CREATIO
10:45	<i>Mid-Morning Coffee & Networking in the Exhibition Area</i>	
11:15	<p>Unlocking the Potential of Data to Drive Financial Transformation</p> <ul style="list-style-type: none"> ○ Understand how to transform data into actionable insights to drive money movements and enhance financial operations ○ Strategies to use data effectively both externally with consumers and internally for streamlined decision making ○ Insights into use cases such as blockchain deposit accounts programmable payments and leveraging data as external triggers for smarter money movements <p>Abhinav Natarajan, Executive Director, Global Product Lead, J.P. MORGAN</p>	<p>Unlocking the Power of Unstructured Data for Innovation in Insurance</p> <ul style="list-style-type: none"> ○ The transformative role of unstructured data and AI in driving innovation across the insurance industry ○ How these advancements create new opportunities for competitive advantage and improved decision-making <p>Aishwarya Ashok, Senior Data Scientist, PURE INSURANCE</p>
11:45	<p>Scaling AI: the Value and Governance Paradigm</p> <p><i>GenAI is moving fast, but how do you move beyond pilots and experiments to achieve a real business impact at scale ?</i></p> <p><i>In this keynote, we'll break down the key pillars for scaling GenAI across financial services, ensuring measurable value while addressing compliance, risk and governance. From establishing strong governance and controls to defining the right people, roles and technology accelerators, we'll examine the critical feedback loop between business value and AI adoption. We will also showcase real-world AI demos, illustrating how AI-</i></p>	<p>Inspiring Innovation with AI at NYL</p> <p><i>Like many companies, GenAI was first met with a range of responses from enthusiasm to skepticism to fear. Changing a culture to embrace AI innovations including GenAI that can affect how we operate day-to-day requires communication and engagement along multiple fronts including proof of value and an opportunity to get up close and personal with these new tools.</i></p> <p><i>Mary Louie, will discuss the impact of GenAI on the Service area and Rita Fuller will describe complementary activities that helped employees across the company to be prepared and be excited about New York Life's journey toward GenAI adoption.</i></p>

	<p><i>powered solutions are already transforming the financial services industry. See how cutting-edge AI applications are driving tangible impact !</i></p> <p><i>Finally, we will tackle a major question : Are AI agents truly ready for financial services, or are we still in the realm of speculation ?</i></p> <p><i>Join us to separate hype from pragmatism, uncover pragmatic insights, and build a clear roadmap for scaling AI and confidence?</i></p> <p>Akhilesh Kale, Partner, Financial Services, Data & AI Foundations, ARTEFACT Hortense Viard, Partner, Financial Services, Risk & Regulatory, ARTEFACT</p>	<p>Rita Fuller, Corporate Vice President, Data Science & Artificial Intelligence, NEW YORK LIFE INSURANCE COMPANY Mary Louie, Corporate Vice President, Director of Data Science, NEW YORK LIFE INSURANCE COMPANY</p>
<p>12:15</p>	<p>PANEL DISCUSSION: Scaling AI in Financial Services: Strategies and Best Practices</p> <ul style="list-style-type: none"> ○ Moving from AI pilots to production-scale deployment ○ Overcoming challenges in scaling AI models ○ Aligning AI strategy with business objectives <p>Hardik Dave, Director, Digital & Data Platforms BLACKROCK Pawan Verma, Chief Data Officer, INDUSTRIAL AND COMMERCIAL BANK OF CHINA Koosha Golmohammadi, PhD, Executive Director of Data Science, CHASE Adrija Banerjee, Director, AMERICAN EXPRESS</p> <p>Moderator: Bryan McCann, Co-Founder & Chief Technology Officer, YOU.COM</p>	<p>PANEL DISCUSSION: How Can Companies Best Utilize New Technologies to Improve Overall Outcomes?</p> <ul style="list-style-type: none"> ○ Leveraging data analytics for executive decision-making and what new technologies can enhance desired outcomes ○ Building a data-centric decision-making culture. ○ Transforming data insights into strategic actions ○ The future of AI; how can AI improve business outcomes <p>Ashlyn Lackey, Director Innovation Strategy, PRUDENTIAL FINANCIAL Yvonne Li, Chief Data & AI Officer, STARR INSURANCE Rich Pluschau Chief Information Officer, FALCON RISK SERVICES</p> <p>Moderator: Carina Oriel, Fintech Platform Lead, BARCLAYS</p>
<p>1:00</p>	<p><i>Lunch & Networking in the Exhibition Area - Lunch & Networking in the Exhibition Area</i></p>	

<p>2:15</p>	<p>CDO Data & Real-Time data strategies to combat Artificial Intelligence(AI) & Machine Learning (ML)</p> <ul style="list-style-type: none"> ○ In the era of AI and ML models, importance of real-time data consumption & movement is evolving each minute- what strategies are CDOs adapting to keep up? ○ Data strategies & governance for LLM safety and data sharing ○ Data consumption , publishing on cloud and CDO strategies to take data engineering to the 'next level' <p>Dimple Thakkar, Head of data for AI and ML, J.P. MORGAN CHASE & CO</p>	<p>From Startup to Scale: Navigating Data, Analytics, and GenAI in the Growth Journey</p> <p>This session will explore the key challenges and opportunities in building a scalable data and AI strategy, from foundational governance to leveraging generative AI for competitive advantage.</p> <p>Whether you're a startup laying the groundwork or a larger firm evolving its AI and analytics strategy, this discussion will provide valuable insights for sustainable and responsible growth.</p> <p>Michael Mocanu, Senior Director, Data Science, LIBERTY MUTUAL INSURANCE Rich Pluschau Chief Information Officer, FALCON RISK SERVICES</p>
<p>2:45</p>	<p>AI-Powered Wealth Management: Enhancing Client Services</p> <ul style="list-style-type: none"> ○ Personalizing wealth management with AI-driven insights. ○ Automating portfolio management and client interactions. ○ Balancing AI-driven services with human expertise. <p>Jake Katz, Head of Analytics Research, LONDON STOCK EXCHANGE GROUP (LSEG)</p>	<p>3:00: Unlocking Trust in Data for Effective Risk Management in Fraud Detection with AI</p> <p><i>In today's fast-paced financial landscape, reliable data is the backbone of informed decision-making, and Artificial Intelligence (AI) is revolutionizing the way financial institutions approach risk management. As financial institutions navigate vast amounts of complex data, ensuring its accuracy and integrity is crucial for strategic initiatives, risk management, and regulatory compliance.</i></p> <p><i>Join Curtis O'Dell, Global Business Director for Data Integrity, as he delves into the critical relationship between data integrity and the success of AI and ML initiatives in finance. This session will explore:</i></p> <ul style="list-style-type: none"> • <i>The importance of data integrity in finance and its impact on AI/ML initiatives</i> • <i>Building a resilient and trustworthy data testing system for AI success</i> • <i>Real-world challenges and success stories from enterprises that have achieved AI-driven results with high-quality data</i>

		<ul style="list-style-type: none"> • <i>Strategies for leading financial institutions to confidently leverage data-driven risk management for AI-powered fraud detection</i> • <i>How maintaining data for the financial sector is crucial in providing an auditable, compliant, and rigorous approach to managing data, conversions, and mergers.</i> <p><i>Don't miss this opportunity to learn how to cultivate unwavering trust in your data and unlock the full potential of your AI/ML initiatives.</i></p> <p>Curtis O'Dell, Global Business Manager, TRICENTIS</p>
<p>3:15</p>	<p>AI Risk Management Across Three Lines of Defense Addressing bias in AI models for fair financial services. Implementing ethical AI frameworks. Ensuring accountability and transparency in AI deployment. Adrija Banerjee, Director, AMERICAN EXPRESS Jaydip Mukhopadhyay, Vice President, Data Science & Model Risk, Internal Audit, AMERICAN EXPRESS</p>	<p>3:30 End of Insurance Conference</p>
<p>3:45</p>	<p>End of Financial Services Conference</p>	