

Harnessing Disruptive Innovation with Indices

A complimentary virtual event for financial advisors

DATE: Tuesday, June 22, 2021

TIME: 11:00 AM – 1:00 PM EDT

WELCOME & INTRODUCTION

Shaun Wurzbach, Managing Director, Head of FA Channel Management, S&P Dow Jones Indices

WHY DISRUPTIVE TECHNOLOGY MATTERS TO ADVISORS

Keynote Speaker: Ric Edelman, Founder, RIA Digital Assets Council

SPOTTING DISRUPTIVE TECHNOLOGY IN SECTORS AND INDUSTRIES

Moderator: Travis Robinson, CFP, Senior Director, FA Channel Management, S&P Dow Jones Indices

Panelists:

- **John van Moyland**, Managing Director, Global Head of S&P Kensho Indices, S&P Dow Jones Indices
- **Matthew Bartolini**, CFA, Head of SPDR Americas Research, State Street Global Advisors

MAKING INNOVATION ACCESSIBLE

Moderator: Shaun Wurzbach, Managing Director, Head of FA Channel Management, S&P Dow Jones Indices

Panelists:

- **Kim D. Arthur**, CEO & CIO, Main Management, LLC
- **Ben McMillan**, Chief Investment Officer, IDX
- **Bruce P. DeLaurentis**, Principal & Founder, Kensington Asset Management
- **Benjamin M. Lavine**, CFA, CAIA, RICP, Co-Chief Investment Officer, 3D/L Capital Management

CAPTURING FUTURE TECH WITH INDEX-BASED TOOLS

Moderator: Ed Ware, Senior Director, FA Channel Management, S&P Dow Jones Indices

Panelists:

- **Anu R. Ganti**, CFA, Senior Director, Index Investment Strategy, S&P Dow Jones Indices
- **Simeon Hyman**, CFA, Head of Investment Strategy, ProShares
- **David Mazza**, Managing Director, Head of Product, Direxion

CLOSING REMARKS

John van Moyland, Managing Director, Global Head of S&P Kensho Indices, S&P Dow Jones Indices

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Agenda subject to change.