



SUMMIT AGENDA

April 18, 2023 | 12:00 PM ET

22 Vanderbilt Business Center and Hospitality
335 Madison Avenue, New York
7th Floor - Vanderbilt Room

12:00 – 12:45 PM	Arrivals and lunch
12:45 – 1:00 PM	Welcome and Opening Remarks
1:00 – 2:00 PM	Direct Indexing Powered by A.I.
2:00 – 3:00 PM	Data Management Solutions
3:00 – 3:15 PM	Networking Break
3:15 – 4:00 PM	Voice of Client Advisory Council — Client Experience
4:00 – 4:30 PM	Wrap-up and takeaways from the day
4:30 PM	Depart; Hotel check-in
5:30 – 9:00 PM	Dinner at Keen's Steakhouse (located at 36th & 6th)
9:00 – 11:00 PM	New York Experience (details provided during dinner)