CRAMER ROUNDTABLE SERIES

Structured Products

October 17, 2024 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Jack Cramer**
8:20am	**Structured Product Landscape: Insights & Trends** - The Story of 2024 - Market Dynamics and Pricing Strategies - Emerging Trends and Future Outlook	**Chris Ahn –** Bank of America **Ana Guiu –** UBS **Ezgi Ertan –** JPMorgan
9:35am	**Demystifying Arrow** - Quantifying Risk Through Data-Driven Insights - Arrow's Role in the Current Ecosystem - Driving Growth and Innovation	**Mike D'Auria –** JPMorgan **Dave Walsh –** Arrow Investment Analytics
10:45am	**Balancing Growth and Risk** - Reg BI Implementation - Concentration Guidelines - Exploring Growth Opportunities with SMAs	**Michelle Rogers –** Kovack Securities **Chris Loudon –** Raymond James **Erwan Fesquet –** MassMutual
11:45am	**Lunch**	
12:55pm	**Building the Core: Scaling Structured Products with Mission-Driven Branding** - Crafting a Mission Statement for Growth - Integrating Branding with Calendar Offerings - Enhancing Scalability Across Client Segments	**Vishal Desai** – Citi Global Wealth Mgmt
2:10pm	**Ask Anyone Anything**	**Open Forum**
3:20pm	**The Future of Structured Products** - Opportunities for Growth - Identifying and Mitigating Risks - Innovation and Adaptation	**Andrew Kuefler –** iCapital **John Marone –** InspereX **Lauren Drenning –** LPL
4:00pm	**Closing Remarks**	**Todd Nixon**

*Times may shift based on group engagement.