CRAMER ROUNDTABLE SERIES

Tech + Ops

11.05.26 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Rhonda Kulhanek**
8:15am	**What Gets Built, Bought & Funded?** **Discussion Focus:** How firms decide where to invest time, money, and resources as AI, automation, staffing needs, and changing economics reshape technology priorities. **Be Prepared To:** Share how your firm prioritizes technology investments, weighs people versus technology, evaluates build vs. buy decisions, and determines whether existing investments are delivering enough value to justify continued funding.	**Steve Josephson –** Bankers Life **Jason Estes –** Lincoln Investment **Russell Tate –** Regions Inv Services
9:45am	**From Pilot to Production: Getting Technology to Stick** **Discussion Focus:** How firms move from selecting technology to piloting, training, implementation, driving adoption, and embedding it into everyday operations. **Be Prepared To:** Share how your firm approaches pilots, selects participants, measures success, builds internal champions, drives adoption, and determines when technology becomes part of how the organization does business.	**Doug Howard –** Regions Inv Services **Roy Echols –** Suncoast Credit Union **Stephanie Hook –** UW Credit Union
11:05am	**Building the Firm of Tomorrow** **Discussion Focus:** How AI, agents, data, governance, and new operating models are changing how firms work and what needs to be in place to scale these capabilities responsibly. **Be Prepared To:** Share where your firm is moving beyond individual tools toward new ways of working, what foundational capabilities are needed, where agents and automation are already doing meaningful work, and how roles may evolve as technology takes on more routine tasks.	**Terry Schroeder –** Cetera **Travis Armstrong –** Oxford **Doug Mayo –** University Federal CU
11:50am	**Lunch**	

*Times may shift based on group engagement.

CRAMER ROUNDTABLE SERIES

Tech + Ops

11.05.26 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

12:50pm	**Moving Fast Without Breaking Things** **Discussion Focus:** How firms can keep pace with rapidly evolving AI and technology while managing regulatory expectations, data security, vendor risk, human oversight, and the controls needed to demonstrate accountability. **Be Prepared To:** Share how your firm is governing AI and emerging technology, where you see the greatest risks, how vendor changes are monitored, what decisions should remain in human hands, and what it means to move fast responsibly.	**Ann Robinson –** Farmers **Chris Mills –** Feathery **Sid Yenamandra –** SurgeONE
2:00pm	**What Friction Points Should We Solve Next?** **Discussion Focus:** In curated groups, identify one business friction that could be addressed through technology, automation, or AI, and explore what it would take to turn a potential solution into reality. **Be Prepared To:** Identify the friction point, how technology, automation, or AI could help solve it, and what needs to be addressed around data, integration, compliance, budget, security, training, process, and adoption to make it happen.	**Breakout Session**
3:05pm	**Breakout Presentation: What Should We Solve First?** **Discussion Focus:** Hear each group's top friction points, how technology, automation, or AI could help address them, and what it would take to turn ideas into practical solutions. **Be Prepared To:** Present your group's top ideas, including the friction point, potential technology solutions, and what it would take to make them happen. Be ready to share perspectives and build on ideas from other groups.	**Blake Wood –** Envestnet **Larry Gratch –** Fidelity **Farayi Chimbangu –** Pershing
3:50pm	**Ask Anyone Anything** **Discussion Focus:** An open, unscripted forum for candid peer perspectives, ideas, challenges, and lessons learned. **Be Prepared To:** Bring a question you'd like the group to answer.	**Open Forum**
4:15pm	**Closing Remarks**	**Todd Nixon**

*Times may shift based on group engagement.