

Cerulli Research Summit



U.S. Market Update & Outlook

Tuesday, June 20, 2023 | Searcys at The Gherkin | 30 St Mary's Axe, London EC3A 8EP

Join Cerulli Associates for an invitation-only afternoon dedicated to exploring the world's largest asset management marketplace. Deep dives into the institutional and wealth management marketplaces, as well as an investigation of the ever-evolving alternative investments industry, are structured to help attendees plan for growth and execution. Audience size will be limited to encourage engagement so register today!

Time	Agenda
1300 - 1330	Registration
1330 - 1340	Introductory Remarks and Global Outlook <i>Jared Baucom, Managing Director, Global Sales and Marketing</i>
1340 - 1420	U.S. Wealth Management Marketplace <i>Bing Waldert - Managing Director, U.S. Research</i> During this session, Cerulli's Managing Director of U.S. Research, Bing Waldert, will discuss opportunities for winning market entry and market share in the world's largest wealth management marketplace.
1420 - 1500	U.S. Institutional Marketplace <i>Laura Levesque, CFA - Director, U.S. Institutional Research</i> Gain critical insights from Cerulli's Director of U.S. Institutional research on what it takes to enter and compete in this marketplace with discussions on client segmentation, strategies for addressing asset owners directly and through investment consultants or outsourced chief investment officers (OCIOs), investment and vehicle strategy preferences, and a roadmap for growth.
1500 - 1510	Break
1510 - 1550	U.S. Alternatives Marketplace <i>Daniil Shapiro, CFA - Director, U.S. Product Development</i> Cerulli's head of U.S. Alternative Investments research will walk you through a competitive analysis of this rapidly changing market where investment strategy, vehicle selection, and distribution strategy are paramount in attracting the attention and flows of institutional and wealth management clients.
1550 - 1600	Closing Remarks <i>Andre Schnurrenberger, CFA, Managing Director, Europe</i>
1600 - 1700	Networking & Cocktail Reception