PURCHASE YOUR PASS

BUY 1 PASS GET 1 FREE
*All Access passes, limited to first 10 end users only.

INTELLIGENT AUTOMATION

for Banking, Financial Services & Insurance

January 28 – 30, 2019 | Andaz Wall Street | New York City, NY

THE HERE & NOW AND
NEAR FUTURE OF IA FOR BFSI

RPA ▪ AI ▪ MACHINE LEARNING
COGNITIVE, DEEP LEARNING & MORE

KEYNOTE SPEAKER

Milind Nagnur

Chief Information Officer, Customer Enablement and Business Automation Technology, Enterprise Core Services, **Wells Fargo & Company**

Milind Nagnur, Chief Information Officer for Customer Enablement, Artificial Intelligence and Automation at Wells Fargo & Company, is responsible for strategy, technology and growth to position the firm for the future.

Milind has over 20 years of experience in large-scale global programs. In his various roles, he has been responsible for driving efficiency and effectiveness in core areas of growth, risk and performance management and regulatory compliance. In addition, he has enabled engineering excellence in capabilities such as data, CRM, advanced analytics/AI, robotics, payments technologies and neural computing.

Prior to his current role, Milind was Managing Director and Global Head of Data, Advanced Analytics and Regulatory Services at Citigroup, focused on designing and delivering large-scale CFO, CCO & CDO transformation programs. Prior to Wells Fargo and Citi, Milind held a number of leadership positions within the technology arms of leading institutions including JPMorgan Chase and Price Waterhouse Coopers.

Milind has a Bachelor of Technology Degree from Indian Institute of Technology, Bombay, and an M.B.A. in Computer Information Systems and Finance from Indian Institute of Management, Calcutta. Additionally, Milind has co-authored a book on 'Java2 Network Security' published by Prentice Hall.

SPEAKER FACULTY

Chris Gilmore
Application Technology Leader
Aetna
- **NEW**

Brian McGuire
Assistant Vice President, Finance Automation Lead
Zurich North America
- **NEW**

Michael Edmonds
Robotics Process Automation Manager
Farmers Insurance
- **NEW**

Mark Martiak
Wealth Strategist
Premier Wealth Advisors
- **NEW**

Jeff Machols
Vice President, Head of Continuous Improvement Center
Voya Financial – NEW

Shoshana Lubin
Head of Operations
Pantheon Ventures
– NEW

Kellie Tickell
Assistant Vice President, Intelligent Process Automation
Voya Financial
– NEW

Willie Session
Head Security Risk, U.S./Chief Security Risk Officer
HSBC Bank - NEW

Jerry Wagner
Senior Product Manager, Intelligent Automation
Capital One
– NEW

Manish Jain
PMP, Senior Director, Robotics & Intelligent Automations
RBC (Royal Bank of Canada) - NEW

Girish Subramaniam
Vice President & Robotics Program Manager
Bank of the West
- **NEW**

Alexander Fleiss
Chief Executive Officer & Founder
Rebellion Research

Tom Dixon
Senior Vice President - Senior Program Manager
Citizens Bank

Myles Joshua Edwards
IV, Esq. Chief Compliance Officer & General Counsel -
NEW

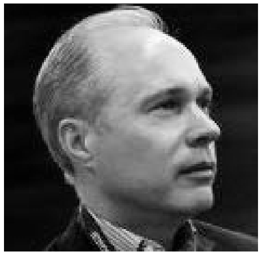
Alejandro Zarate Santovena
Senior Vice President, Financial and Business Analysis Lead
Marsh Inc. - NEW

Stuart Jordan
Director Business Delivery Services
Argo Group U.S. - NEW

Adrienne Hill
Vice President
American Express

Manik Patil
Global Senior Director
AIG

SPEAKER FACULTY



John Paty
Vice President
Expert System

David Oesterreich
Director, Automation CoE
American Express

Collette Crenshaw
Principal Consultant
ISG (Information Services Group) - NEW

Rajan Nair
CEO – Financial Services
Indecomm Global Services - NEW

Asheesh Mehra
Co-Founder & CEO
AntWorks - NEW

Coenraad van der Poel
Managing Director & Head of Americas
UiPath - NEW

Nischal Piratla
Director of Innovation, Ph.D.
Deutshe Bank - NEW

Seth Goldberg
Senior Sales Manager
Softomotive - NEW

Alex Ebner
Chief of Staff Customer Enablement & Business Automation (CEBAT) I Enterprise Core Services I EIT
Wells Fargo & Company

Ryan Davis
Senior Vice President, Procurement Management
Bank of America
IA for BFSI Chairman - NEW

Zander Steele
Director of Sales
HyperScience- NEW

BOT BOARD

Vinod Raman
Vice President, Digital Advice Solutions
Fidelity Investments

Jerry Wagner
Senior Product Manager, Intelligent Automation
Capital One

Gail Hillary
Global Head of General Services & Travel, Citi Shared Services
CITI

Manish Jain
PMP, Senior Director, Robotics & Intelligent Automation
RBC (Royal Bank of Canada)

Brian Golden
Senior Manager, Process Automation Competency Center
CUNA Mutual Group

Tom Dixon
Vice President & Senior Program Manager, Consumer Continuous Improvement & Process Automation
Citizens Financial

ATTENDEE BREAKDOWN

SENIORITY BREAKDOWN

53% Director, VP, and C-Level

18% Manager Level

29% Analyst

INDUSTRY BREAKDOWN

50% Finance and Banking

35% Insurance

15% Computer Services, Real Estate, Technology, and Other

WHO ATTENDS

- Data Governance
- Process Optimization
- Continuous Improvement
- Data Management
- Data Strategy
- Information Security
- Enterprise Technology
- Anti-Money Laundering (AML)
- Machine Learning
- Operational Risk
- Performance Excellence
- Center of Excellence (CoE)
- Continuous Improvement
- Call/Contact Centers
- Enterprise Business Improvement
- Global Business Services
- Business Process Improvement
- Operational Excellence/Process Optimization
- RPA, Artificial Intelligence, Digital & IT
- Procurement
- Business Process Innovation/ Transformation
- HR Operations
- Corporate Strategy
- Global Process Owners/Solutions (P2P, R2R, O2C, T&E)

PAST ATTENDEES OF OUR INTELLIGENT AUTOMATION SERIES INCLUDE

BARCLAYS
Bank of America
Capital One
Prudential
FARMERS INSURANCE
BNY MELLON
StateFarm

OUR TESTIMONIALS

"Hearing from both SSC and technology providers is tremendously valuable regardless of the stage of your RPA journey."

Mastercard

"The conference was extremely informative and I appreciated being able to hear from the software providers and companies that are currently using RPA."

New York Life

"Elevated my thinking around RPA Development & Strategy 100%."

Prudential Insurance Co.

THE HERE & NOW AND NEAR FUTURE OF IA FOR BFSI

AGENDA

PRE-CONFERENCE WORKSHOPS | MONDAY, JANUARY 28, 2019

10:00am

REGISTRATION FOR PRE-CONFERENCE WORKSHOP A & NETWORKING COFFEE

10:30am

WORKSHOP A: IA BOOT CAMP – UNDERSTANDING THE IA UMBRELLA & ITS VARIOUS APPLICATIONS AND BENEFITS

If you're new to IA, or need a refresher course, then this IA Boot Camp is a must attend session for you! During this Workshop, we will examine the vital questions that need to be answered with respect to what's involved in establishing a variety of intelligent automation programs, including: RPA, AI, cognitive, machine learning, and much more – and the benefits these technologies can offer your BFSI organization.

In this interactive session, we will explore:

- What's under the IA umbrella and how each technology works
- The processes each IA technology is customarily utilized for
- Which IA technologies would be most ideal for your project goals
- Range in software costs and what's required to accomplish your objectives, with respect to infrastructure, workforce, and much more

12:30pm

REGISTRATION FOR PRE-CONFERENCE WORKSHOP B & WORKING LUNCH BREAK

1:15pm

WORKSHOP B: AVOID BITING OFF MORE THAN YOU CAN CHEW – ABCs OF A SUCCESSFUL IA PILOT PROGRAM

Although IA technologies serve as valuable tools for a wide variety of business departments and functionalities, before you jump into an enterprise-wide program, you might consider testing out the waters on a smaller scale to ensure success before taking a huge leap of faith, as a successful technology launch or integration will always then translate more smoothly into other departments.

In this Workshop, we will discuss:

- How to determine which functionalities would be best suited for an IA pilot program based upon a department's transactional volume stats, regulations and transparency standards
- Which IA technologies meet the greatest need of your process improvement initiatives
- Vendor solution options that not only work for pilot programs, but will also grow with your IA program/s
- Feasibility and ROI

Jerry Wagner, *Senior Product Manager, Intelligent Automation,* **Capital One**

Working lunch served to all Workshop B attendees

3:15pm

REGISTRATION FOR PRE-CONFERENCE WORKSHOP C & AFTERNOON NETWORKING BREAK

PRE-CONFERENCE WORKSHOPS | MONDAY, JANUARY 28, 2019

3:45pm

WORKSHOP C: DEVELOPING SCALABLE & REPEATABLE IA PROGRAMS

With the BFSI community being one of the early IA adopters, many in the industry are finding themselves at the stage of working through the kinks of how to scale-up their IA programs, ensure continued success, and how to bring forth their successful IA technologies and program roll outs to different lines of business.

In this deep dive Workshop, we will explore:

- Technical and logistical roadmaps to the next steps of advancing your IA program/s, on a multi-location, and/or enterprise-level
- Tools and technologies which are not scale dependent and can be utilized for a wide variety of IA programs of various size, scope, and budgets
- How to develop IA program success repeatability – to be applied towards new business divisions, functionalities, and/or end goals
- Integrating legacy with IA technologies and how to maximize ROI
- Keeping pace with productivity (and your costs and operational needs) as your bot demands increase over time, on a B2B and B2C level

5:45pm **END OF PRE-CONFERENCE WORKSHOP DAY**

5:50pm **CHAMPAGNE TOAST RECEPTION**

"Best conference I have ever attended! Comprehensive, hands on, collaborative and sustainable information."

- AIG

MAIN CONFERENCE DAY ONE | TUESDAY, JANUARY 29, 2019

8:00am

REGISTRATION FOR MAIN CONFERENCE DAY ONE & NETWORKING BREAKFAST

8:50am

CHAIRPERSON'S WELCOME

Ryan Davis, *Senior Vice President, Procurement Management,* **Bank of America**

9:00am

KEYNOTE ADDRESS FIRESIDE CHAT: DEVELOP & MANAGE CHANGE MANAGEMENT INITIATIVES THAT ENSURE IA PROGRAM SUCCESS

Regardless of the maturity of your IA program, the new technologies being deployed can lead to a dramatic shift in culture and processes that may cause red alert chaos for your employees. Without obtaining the trust of all parties concerned and having a clear change management strategy in place, your BFSI organization will not be able to move forward with its IA plans successfully.

This session will discuss:

- Establishing strategic partnerships between various departments, employees, and stakeholders, including an often reluctant IT department
- Building an effective internal communication strategy to avoid miscommunications regarding objectives and impacts of IA on your organization
- How to revamp your organization's processes to be in line with your IA programs

Milind Nagnur, *Chief Information Officer, Customer Enablement and Business Automation Technology, Enterprise Core Services,* **Wells Fargo & Company**

Moderator: **Alex Ebner,** *Chief of Staff Customer Enablement & Business Automation (CEBAT) I Enterprise Core Services I EIT,* **Wells Fargo & Company**

9:40am

CLIENT CASE STUDY: LEVERAGING INTELLIGENT AUTOMATION TO ACHIEVE STRAIGHT-THROUGH PROCESSING WITHIN THE MORTGAGE INDUSTRY

The $1.5M mortgage industry rely on operationally agile business models to help them constantly ramp up and down. Given that the cost of loan origination has tripled in recent years, there is further increasing pressure to drive down cost and bring about efficiency through automation. In this case-study-led, fireside chat, Indecomm reveals how they targeted their process automation efforts on a specific 60-70 day period of the mortgage life cycle, where up to 80-90 highly repetitive QC tasks exist, involving multiple layers of human touchpoints. The session will share details on how AntWorks platform has enabled Indecomm to extract and interpret multiple data formats from hundreds of documents, to answer the question of loan quality with zero human interaction.

Rajan Nair, *CEO - Financial Services,* **Indecomm Global Services**

Moderator: **Asheesh Mehra,** *CEO and Co-Founder,* **AntWorks**

Hosted by: **AntWorks**

10:20am

MORNING NETWORKING BREAK & DEMO DRIVE

Meet with some of the leading IA solution providers by way of this fun and informative speed-dating activity.

MAIN CONFERENCE DAY ONE | TUESDAY, JANUARY 29, 2019

IDGs (INTERACTIVE DISCUSSION GROUPS)

During this part of the conference, delegates will be sorted into groups of up to 20 to take part in Interactive Discussion Groups (IDGs) around the below topics. Upon registering, you will be asked to choose your top two IDG topics (per day) and everyone will rotate between their two choices, in back-to-back 30-minute sessions, with 5-minute transitional breaks between the two discussions.

1st Round
11:10am – 11:40am

5-Minute Transitional Break
11:40am – 11:45am

2nd Round
11:45am – 12:15pm

1A AI TO REDUCE MONEY LAUNDERING & ENSURE REGULATORY COMPLIANCE

- Harnessing the enormous financial benefits robust artificial intelligence, machine learning and big data programs offer to identify, track, and report potential Money Laundering (ML) activity
- Regulatory considerations to keep top of mind
- The IoT's (Internet of Things) place in the overall AML landscape and how to integrate these technologies to work in harmony to provide maximum results

Seth Goldberg, *Senior Sales Manager*, **Softomotive**

Hosted by: **Softomotive**

2A APPLYING AI TO RPA TO MINIMIZE EXCEPTIONS & INCREASE STRAIGHT THROUGH PROCESSING

- Natural Language Processing : the missing link for Intelligent Process Automation
- What steps does it take to leverage your RPA/OCR into true AI
- How to combine Automation efficiency & Human involvement for the best ROI

John Paty, *Vice President*, **Expert System**

Hosted by: **Expert System**

12:15pm **NETWORKING LUNCH BREAK**

1:20pm **5-MINUTE TRANSITIONAL BREAK**

MATURITY CURVE TRACK SESSIONS

Delegates will be asked to select one of the two below track sessions while on-site.

1:25pm

PLANNING & LAUNCHING

ELIMINATE FALSE STARTS & MISSTEPS ALONG YOUR IA JOURNEY WITH AGILE PRINCIPLES

- The benefits of "bot building", program roll out, and continuous management utilizing Agile principles
- Learning as you go, fixing along the way, and improving as you move forward
- Building an effective Agile roadmap to ensure IA program success

Michael Edmonds, *Robotics Process Automation Manager,* **Farmers Insurance**

EVOLVING & MATURING

FIRESIDE CHAT: LAUNCHING & SUSTAINING A BEST IN CLASS COE

Is your BFSI organization evaluating the need to establish a CoE for its IA program or would like to increase its effectiveness?If so, then attend this session to learn key insights and best practices.

We will discuss:

- How to establish or enhance an effective governance and centralized structure to support your organization's intelligent automation CoE initiatives
- Various chargeback models and which might work best for your IA initiatives
- Monitoring a CoE's governance effectiveness
- Financial reporting systems, including the audit and that appropriate controls are in place, most notably, systems for risk management, financial and operational control and compliance
- Change management initiatives and effective PR, marketing and communication plans
- Bot program scalability

Moderator: **Zander Steele,** *Director of Sales,* **HyperScience**

Adrienne Hill, *Vice President,* **American Express**

Jeff Machols, *Vice President, Head of Continuous Improvement Center,* **Voya Financial**

Vinod Raman, *Vice President, Digital Advice Solutions,* **Fidelity Investments**

Hosted by: **HyperScience**

2:05pm

5-MINUTE TRANSITIONAL BREAK

2:05pm

ENSURING IA PROGRAM SUSTAINABILITY BY PROVIDING YOUR AUDITORS & CONTROLLERS WITH WHAT THEY NEED FROM YOUR IA TEAMS

- How to best document your IA initiatives and activities for your Auditors/Controllers
- Best practices in audit requests, document and information reporting and much more
- Your Controllers/Auditors' role in ensuring you're on top of data security that may be affected by IA programs

Tom Dixon, *Senior Vice President - Senior Program Manager,* **Citizens Bank**

MAIN CONFERENCE DAY ONE | TUESDAY, JANUARY 29, 2019

2:45pm

AFTERNOON NETWORKING BREAK & DEMO DRIVE CONTINUATION

3:30pm

CLIENT CASE STUDY: DISCOVER THE POWER OF INTELLIGENT AUTOMATION

Intelligent AI-Powered Automation can deliver meaningful results to the enterprise. Hear how a large bank is automating its operations to drive enhanced customer experiences, employee engagement and profitable growth.

Nischal Piratla, *Director of Innovation, Ph.D.,* **Deutshe Bank**

Hosted by: **WorkFusion**

4:10pm

CLIENT CASE STUDY: ADDING VALUE TO THE BUSINESS UTILIZING IA FOR BFSI

Join us for a Fireside Chat with Paul Krauss, RPA Enterprise CoE Lead at Wells Fargo. Paul rejoined Wells Fargo in 2017 and has led the company's journey to find RPA solutions to a number of challenges, including:

- Reducing customer hold time in the call center
- Reduce operational costs
- Enhancing the customer experience
- Integrating RPA with already existing systems while enabling Wells Fargo's long term vision

Paul Krauss, *RPA Enterprise CoE Lead,* **Wells Fargo**

Moderator: **Coenraad van der Poel,** *Managing Director & Head of Americas,* **UiPath**

Hosted by: **UiPath**

4:50pm

PANEL DISCUSSION: METRICS & KPI TRACKERS TO ENSURE IA PROGRAM SUCCESS

As part of your BFSI organization's overall process improvement and optimization efforts, it's imperative to access and reassess your IA goals, strategies, and performance measurements on a regular basis so to ensure continued program success.

In this session, we will discuss:

- Impactful program management strategies to apply toward your evolving IA initiatives
- Realistic timelines & KPIs to be met and performance measurements to enact to ensure continued program success
- IA software tools and workflow dashboards that help ensure your IA program's are on track

Brian McGuire, *Assistant Vice President, Finance Automation Lead,* **Zurich North America**

David Oesterreich, *Director, Automation CoE,* **American Express**

Kellie Tickell, *Assistant Vice President, Intelligent Process Automation,* **Voya Financial**

5:30pm

END OF MAIN CONFERENCE DAY ONE

5:35pm

EXHIBIT HALL NETWORKING COCKTAIL PARTY

MAIN CONFERENCE DAY TWO | WEDNESDAY, JANUARY 30, 2019

8:00am

REGISTRATION FOR MAIN CONFERENCE DAY TWO & NETWORKING BREAKFAST

8:50am

CHAIRPERSON'S RECAP

Ryan Davis, *Senior Vice President, Procurement Management,* **Bank of America**

9:00am

PANEL DISCUSSION: DOES IA'S PROMISE OF REDUCING AN ORGANIZATION'S HARD & SOFT COSTS ACTUALLY INCREASE ITS PROFITS?

We've all heard the choir singing the "Benefits of IA Tune" countless times before, but is there actually truth in the lyrics? Can you build a business case your C-Suite will buy into based upon your math that proves bots increase your organization's profits?

Answer: Yes!

In this session, we will conduct a deep dive Reality Check into:

- How to calculate the gain from investment into IA to determine the ROI of investment on a short and long-term basis
- Common cross-functional hard and soft costs that can be reduced by IA and how to size up both on a program's operational and financial savings assessment level
- Whether the savings to your organization outweigh the associated expenses

Brian McGuire, *Assistant Vice President, Finance Automation Lead,* **Zurich North America**

Manish Jain, *PMP, Senior Director, Robotics & Intelligent Automation,* **RBC (Royal Bank of Canada)**

Michael Edmonds, *Robotics Process Automation Manager,* **Farmers Insurance**

9:40am

CASE STUDY: UTILIZING CONTINUOUS IMPROVEMENT AND AGILE METHODOLOGIES WHEN DEPLOYING BOTS AT VOYA FINANCIAL

Building an effective bot program is a hurdle for many shared services stakeholders. Voya Financial found a path that worked for them by using and developing an agile roadmap and by focusing on continuous improvement. Using these principles it is possible to deploy your own bots that are focused on your organizations needs.

In this session, participants will:

- Examine a case study of how to roll out a bot program
- Explore the incremental improvements that can be made to deploy bots quickly
- Identify strategies for learning as you go and fixing problems as they are experienced

Jeff Machols, *Vice President, Head of Continuous Improvement Center,* **Voya Financial**

Kellie Tickell, *Assistant Vice President, Intelligent Process Automation,* **Voya Financial**

10:20am

MORNING NETWORKING BREAK & DEMO DRIVE RAFFLE PRIZES ANNOUNCED

MAIN CONFERENCE DAY TWO | WEDNESDAY, JANUARY 30, 2019

11:05am **5-MINUTE TRANSITIONAL BREAK**

IDGs (INTERACTIVE DISCUSSION GROUPS)

During this part of the conference, delegates will be sorted into groups of up to 20 to take part in Interactive Discussion Groups (IDGs) around the below topics. Upon registering, you will be asked to choose your top two IDG topics (per day) and everyone will rotate between their two choices, in back-to-back 30-minute sessions, with 5-minute transitional breaks between the two discussions.

1st Round
11:10am – 11:40pm

5-Minute Transitional Break
11:40pm – 11:45am

2nd Round
11:45am – 12:15pm

1B ORGANIZATIONAL CHANGE MANAGEMENT AND LEADING CHANGE WITH RPA

Organizational change management can often be under-emphasized in the planning and implementation of RPA. This session, we will discuss the essential "piece of the puzzle" and much more, such as:

- Successfully navigating the organizational change process as bots take over the work of humans
- Assuring changes to systems and applications that bots are working with don't create "surprises" that can potentially upset normal, day-to-say bot operations
- Roadmap and best practices for successful bot deployment and the key phases of OCM changeover
- Transition planning, organizational redesign, operational alignment, and communications management
- How to link the RPA COE with the IT change management process to assure the tight connectivity required to prevent unexpected and unanticipated IT changes and subsequent robot interruptions

Collette Crenshaw, *Principal Consultant,* **ISG (Information Services Group)**

Hosted by: **ISG (Information Services Group)**

2B HOW TO RECRUIT & RETAIN TOP IA TALENT TO MEET YOUR EVOLVING IA PROGRAM DEMANDS

- How to recruit and retain top IA talent considering the fierce market demand and high salaries being offered by the competition
- Determining your short and long-term IA workforce needs
- Developing training and career paths for your diverse and evolving IA workforce
- Pros and cons of freelance & permalance IA teams and how to best manage these types of working relationships
- Working with IT Recruiters

Shoshana Lubin, *Head of Operations,* **Pantheon Ventures**

12:20pm **NETWORKING LUNCH BREAK**

"Highly educational. It has been a fantastic opportunity to learn how others in our industry are leveraging RPA."

- CITI

MAIN CONFERENCE DAY TWO | WEDNESDAY, JANUARY 30, 2019

1:25pm

THE EVOLUTION OF ROBOTICS: FROM AUTOMATION TO INTELLIGENT AUTOMATION

While servicing millions of clients through repetitive work, the BFSI community was one of the first to adopt Robotic Process Automation to create efficiencies and additional capacity handling by automating these tasks. As organizations mature their Robotics Capabilities, the need for a smarter robotic fleet has become more apparent due to the need for expanding bot ingestion capabilities (structuring & consuming data) and making complex decisions while processing. With the AI tech industry evolving rapidly and the removal of barriers to AI adoption in organizations, the feasibility and cost-effectiveness for the BFSI to leverage AI for augmenting their robotics programs has become natural next step.

In this session we will explore:

- What is AI?
- How does AI tie in with Robotics and Process Transformation?
- Example of an IA application
- Things to consider when starting your journey of intelligent automations

Manish Jain, *PMP, Senior Director, Robotics & Intelligent Automation,* **RBC (Royal Bank of Canada)**

2:05pm

AFTERNOON NETWORKING BREAK

2:40pm

REALITY CHECK: BOTS ON A 24/7 SCHEDULE? IS IT REALLY NECESSARY OR EVEN FEASIBLE?

There has been a popular misconception amongst the mainstream business community since bots were first introduced and is still believed by many that "bots can work 24/7" and do not require time off. If you've been working with these technologies, you are likely aware that this is not the case. Bots do need time off and most of the processes you might hand over to a bot do not require a 24/7 bot, or perhaps even a full-time bot.

In this session, we will discuss:

- After you determine which processes you would like your bots to handle, how do you decide upon their overall work schedules on a project and time management basis?
- Cost scenarios of bots working on projects on a seasonal or set time each day, week, or month and how to develop that forward schedule with your bot workforce so to ensure maximum productivity and ROI

Stuart Jordan, *Director Business Delivery Services,* **Argo Group U.S**

Alexander Fleiss, *Chief Executive Officer & Founder,* **Rebellion Research**

Jerry Wagner, *Senior Product Manager, Intelligent Automation,* **Capital One**

3:30pm

TOWN HALL: LESSONS LEARNED – HOW TO BEST UTILIZE IA FOR BFSI & ENSURE PROGRAM SUCCESS

In this final yet very important session, we will look back on what everyone has learned over the course of the past 3-days as it relates to how to plan and implement a wide variety of IA programs.

4:15pm

END OF MAIN CONFERENCE DAY TWO – SEE YOU NEXT YEAR!

SPONSORS

ANTWORKS
Reimagine • Rethink • Recreate

direct commerce

EXPERT SYSTEM

(h[s]) HYPERSCIENCE

indico

ISG

PERSISTENT

softomotive
We talk automation

WorkFusion

UiPath

SPONSORSHIP OPPORTUNITES

Networking

Ensure that you have the opportunity to engage with the key decision makers within your industry. We can create a platform for you to effectively interact with your top customers and prospects in the environment of your choice. This can range from formalized private meetings / workshops right through to less structured networking events such as sponsored drinks receptions, coffee breaks or lunches. Ultimately whatever you decide is the right forum; we will support you in your quest to advance relationships with the key people who can influence the future of your business.

Branding

Your company can be elevated to a position where they are seen as a market leader. In a fiercely competitive market you need to ensure that your brand is differentiated from the competition. Failure to create a clear identity will see your organization fade into the background. We ensure that we do everything we can to effectively lift your brand before, during and after the event. Not only do we create a fully integrated marketing campaign, which your company can be part of, but we also offer high impact premium branding opportunities for example on bags, water bottles, pens lanyards etc.

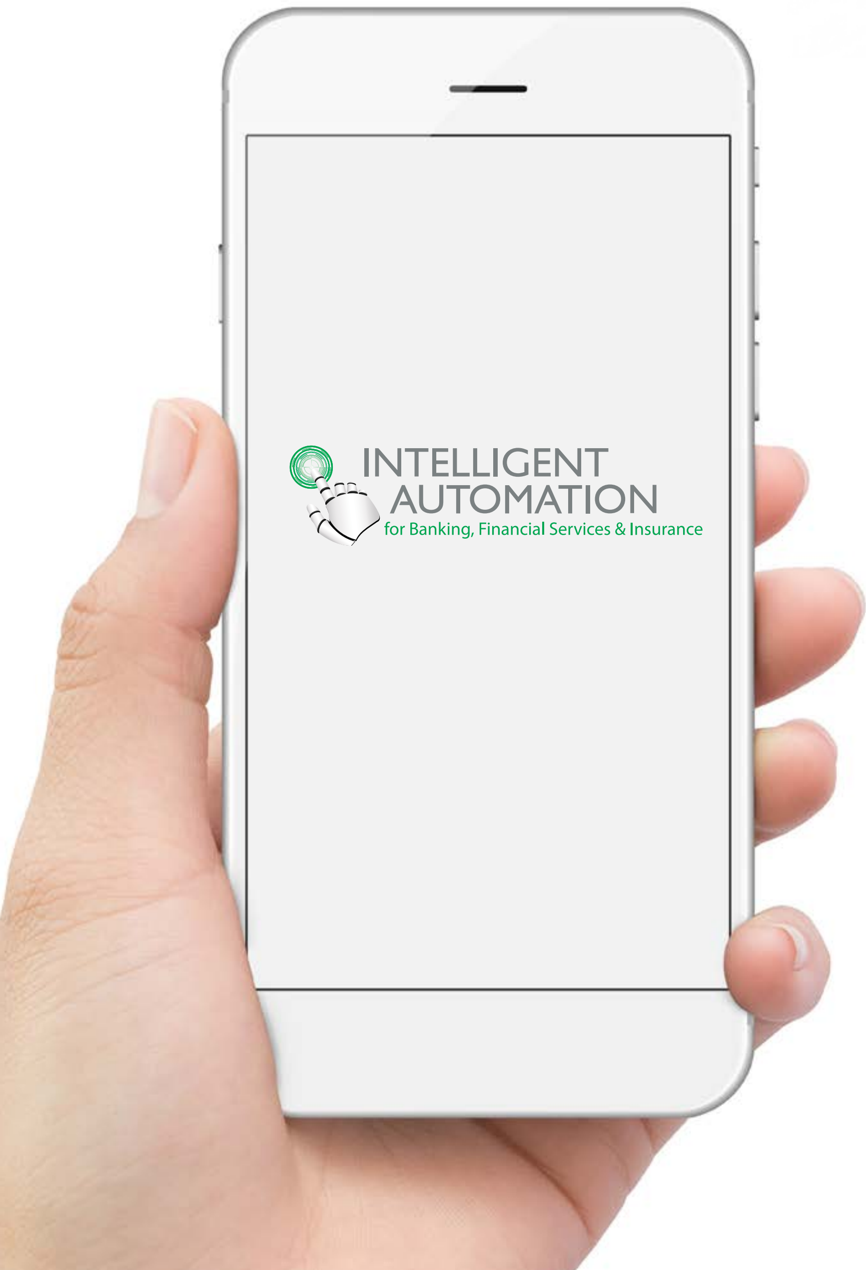
Thought Leadership

If you think that you should be viewed as a true industry leader then your need to demonstrate your market knowledge and expertise through a thought leadership opportunity, such as speaking or chairing. This is a highly unique opportunity for your company to educate the market, and as long as you are credible enough to fit into a high level event program, we can position your organization alongside top customers and prospects in our speaker faculty. As part of this speaker faculty your company will be set apart from other industry attendees giving you the competitive edge required to make further strides in the market.

SPONSORSHIP & EXHIBITING OPPORTUNTIES

Event sponsorship is an excellent opportunity for your company to showcase its products and services to senior level, targeted decision makers. For more information, call Vinny Rama at 212-885-2770 or email him at vinny.rama@ssonetwork.com

IA EVENT APP - STAY UPDATED!



Download the mobile app to create your personalized conference schedule, stay current on any program scheduling changes, learn more about the exhibitors, schedule meetings with industry peers, and to share your experience live.

Stay Connected on the Go:

- Receive agenda updates and track when your favorite speakers are scheduled to present
- Connect with attendees on LinkedIn and Twitter directly through the app, exchange private messages, and manage your connections seamlessly
- Engage with solutions providers and schedule a time for a personalized consult
- Attend with your team to maximize your experience: share notes, plan meetups, and more with just a few swipes

Here's How to Download It:

- Search for 'SSON Events' in your app store
- Create a profile & sign up
- Complete your profile & hit 'join'
- Click on 'Intelligent Automation' event and join the fun!

JOIN US AT THE EPICENTER OF BFSI

NEW YORK CITY

VENUE

Andaz Wall Street
75 Wall Street
NY, New York 10005
(212) 590-1234
www.hyatt.com/en-US/hotel/new-york/andaz-wall-street/nycaw

Immerse yourself in the heart of Wall Street while at the IA for BFSI conference, taking place at the Andaz Wall Street hotel. The Andaz hotel features a corporate center nearby, 24-hour gym and "The SPA", which offer ideal spaces to relax and re-energize. Dine at the Andaz Kitchen & Bar, sip craft beer at the Beer Garden, or enjoy nightly complimentary wine hour in the lobby.

Soon to come: Information regarding the hotel discount rate all speakers and sponsors can take advantage of and how to secure said discount.

EXPLORE NYC!

Greenwich Village Food Walking Tour: Fantastic food tour. Come hungry!

New York City Helicopter Adventure: Wonderful tour from above of New York's iconic sights. If it's in your budget, definitely worth it.

One World Observatory: Popularly known as the Freedom Tower, the recently completed 102-story skyscraper greets visitors heading for the elevators with a wall of talking panels where workers tell the story of the construction and a cavern-like passage through the foundation of bedrock.

Federal Reserve Bank of New York Museum: The highlight of this informative one hour tour explaining our banking system is a visit to the world's largest store of gold, resting in a concrete bunker five floors underground. The 308 billion gold bars in this vault, weighing about 6400 tons, are an impressive sight.

PRICING & REGISTRATION

3 EASY WAYS TO REGISTER

Call 1-800-882-8684

Email enquiryiqpc@iqpc.com

Register Online intelligentautomationbfsi.iqpc.com

PRIMARY

PACKAGE	REGISTER & PAY BY JANUARY 4TH	ON-SITE
Silver: Main Conference Only (2 days)	$1,999 **SAVE $400**	$2,399
Gold: Main Conference Pass + 4 Workshops	$2,799 **SAVE $600**	$3,399
One Workshop (a la carte)	$589	

VENDORS

PACKAGE	REGISTER & PAY BY JANUARY 4TH	ON-SITE
Main Conference Only (2 days)	$3,699 **SAVE $300**	$3,999
One Workshop (a la carte)	$589	

BUY 1 PASS GET 1 FREE *All Access passes, limited to first 10 end users.

TEAM DISCOUNTS

SEND	DISCOUNT
3 to 4	20%
5 or more	30%

*Discounts apply to registrations submitted together, at the same time. Cannot be combined with any other discount. Valid for both Primary and Vendor markets.

INTELLIGENT AUTOMATION for Banking, Financial Services & Insurance

*IQPC reserves the right to determine who is considered an End-User or a Vendor upon registration for an event. Those who are determined a vendor will be denied access to End-User pricing. These prices are featured as a limited time only promotion. IQPC reserves the right to increase these prices at its discretion.

Please note multiple discounts cannot be combined. A $99 processing charge will be assessed to all registrations not accompanied by credit card payment at the time of registration.

MAKE CHECKS PAYABLE IN U.S. DOLLARS TO: IQPC

*CT residents or people employed in the state of CT must add 6.35% sales tax.

Team Discounts: For information on team discounts, please contact IQPC Customer Service at 1-800-882-8684. Only one discount may be applied per registrant.

Special Discounts Available:

A limited number of discounts are available for the non-profit sector, government organizations and academia. For more information, please contact customer service at 1-800-882-8684.

Details for making payment via EFT or wire transfer:

Bank Name: JP Morgan Chase & Co.
Name on Account: Penton Learning Systems LLC dba IQPC
Account #: 937-332641
ABA/Routing #: 021000021
Reference: 29107.002

Payment Policy: Payment is due in full at the time of registration and includes lunches and refreshment. Your registration will not be confirmed until payment is received and may be subject to cancellation. For IQPC's Cancellation, Postponement and Substitution Policy, please visit www.iqpc.com/cancellation

Special Dietary Needs: If you have a dietary restriction, please contact Customer Service at 1-800-882-8684 to discuss your specific needs.