

# MOMENTUM AI NEW YORK 2025

AI Leadership Summit

April 28-29 | Convene, 117 West 46th Street

REGISTER NOW

300+  
Executive Attendees

36%  
C-Suite Leaders

50+  
CXO Speakers

10+  
Networking Events

Unlimited  
Fortune 200 Insights

## Operationalize AI to drive business impact & ROI

In an era where AI is rapidly reshaping the enterprise landscape, technology and business leaders find themselves at a critical crossroads. The promise of AI transformation is immense, yet the path to successful implementation remains complex and challenging.

From integrating AI solutions and responsible AI governance to scaling initiatives and developing talent, enterprises are grappling with decisions that will define their competitive edge for years to come.

This is where Momentum AI New York 2025 steps in as your strategic compass. Through interactive sessions, real-world case studies, and unparalleled networking opportunities, you'll connect with and gain actionable insights from those who are successfully navigating the AI transformation journey.

**Don't just read about the next wave of enterprise AI innovation – shape it.**

“

Wow, what an excellent experience! Just wrapped up speaking at the Reuters Momentum event in Austin... this is a defining moment for #AI, and an extraordinary time to be a digital leader. Thank you to the incredible Reuters team for organizing such critical discussions. It was a pleasure to be a part of it.”

– Chief Strategy & Transformation Officer, PepsiCo

## Taking to the New York Stage for 2025



**Marco Argenti**  
Chief Information Officer  
Goldman Sachs



**Mojgan Lefebvre**  
EVP and Chief Technology  
& Operations Officer  
Travelers



**Steve Hasker**  
President & Chief Executive  
Officer  
Thomson Reuters



**Andrea Abell**  
Chief Information Security  
Officer  
Eli Lilly



**Katya Andresen**  
Chief Digital & Analytics  
Officer  
The Cigna Group

[VISIT WEBSITE](#)

## Why Attend Reuters Events: Momentum AI New York?



### TRUSTED

In the AI world, where trust is paramount, align with Reuters, the foremost source of unbiased news and business information.



### PROVEN

We boast a history of successfully convening top-tier AI executives from diverse industries at our events.



### SPECIALIST PROGRAMMING

Meticulously crafted agenda sessions and intimate workshops will facilitate comprehensive exploration of innovative AI use cases.



**Cutting-Edge Insights:** Immerse yourself in a knowledge-rich environment where 300+ thought leaders, visionaries, and industry experts converge to share groundbreaking insights. Discover how traditional AI algorithms and generative AI are powering transformative solutions across sectors.

**Hands-On Learning:** Our hands-on workshops and technical sessions provide an invaluable opportunity to gain practical AI skills and understand how to implement AI applications within your organization effectively.

**Deep Dive on AI in Finance:** Discover where AI is making the biggest transformations across the financial services sector. In an interactive format, sessions will look at and how you can manage opportunities and risk in the deployment of AI tools and technologies in both back-end and front-end environments to optimize your operations.

**Disruptive Innovation Showcase:** Witness firsthand how the most innovative organizations are disrupting industries and business models with AI. From finance to healthcare, manufacturing to marketing, our showcase highlights the transformative impact AI has on diverse sectors.

**Network with 300+ business leaders:** Forge new connections and strengthen existing ones during our networking events. Connect with like-minded professionals, industry disruptors, and potential collaborators who share your passion for AI-driven innovation.

**Thought-Provoking Keynotes:** Be inspired by visionary keynotes from leaders in the field. Gain insights into the future of AI, ethics in AI implementation, and the limitless potential of AI-powered enterprise solutions.

**AI Ecosystem Exploration:** Explore the ever-expanding AI ecosystem and understand how AI fits into your enterprise strategy. Gain clarity on the opportunities and challenges AI presents to your business.

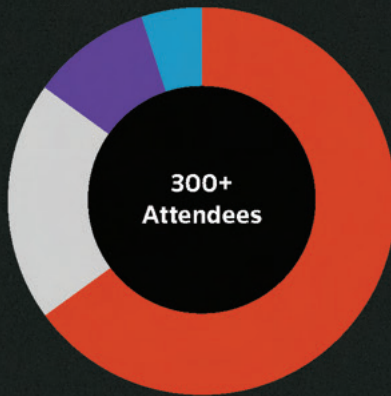


**Reuters Momentum showcased the thought leadership in the field of Artificial Intelligence in a way that was never done before. Drawing attention to important aspects at the right time in the right setting to balance the opportunities and risks in this new era of AI. Congratulations to the team at Reuters for making this a successful endeavour!"**

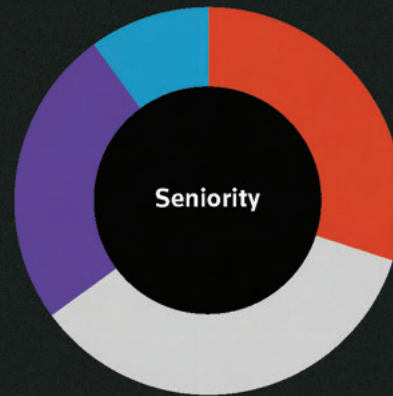
**– Sherin Kuriakose, Director of PMO, Marek**



## Audience Breakdown



- End User Enterprises
- Technology Companies
- Consultants & Advisory
- Government, Media, Other



- C-Level
- SVP, VP, Head of
- Director
- Manager, Other

## A Snapshot of Companies Confirmed to Attend:



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## A Snapshot of Job Titles in Attendance:

CEO	Head of Generative AI
Chief AI & Data Officer	Head of Innovation & AI
Chief Analytics Officer	Head, AI Innovation, Oncology Medical Affairs
Chief Business Officer	Lead Data Scientist
Chief Digital & Analytics Officer	Managing Director
Chief Digital & Technology Officer	Product Analyst Enterprise Automation & AI
Chief Information and Operations Officer	Senior Data Scientist
Chief Information Officer	Senior Director - Machine Learning
Chief Information Security Officer	Senior Director Comms and Strategy for Global Technology
Chief Innovation and Digital Officer	Senior Director of Engineering
Chief Innovation Officer	Senior Director, AI Product Manager
Chief Privacy Officer	Senior Director, Commercial Data Strategy & Governance
Chief Technology Officer	Senior Managing Director, Head of AI & Emerging Tech
CIO	Senior Product Operations Manager, Gen AI
Co-Chief Information Officer	Senior Vice President, Tech Strategy, Operations & Emerging Technology
CTO	Sr. Director Data Analytics
Director - Data & Insights	Sr. Director of Digital Strategy
Director Analytics Architecture and Solutions	Staff Vice President, Enterprise Change Management
Director of AI Transformation	SVP & CDAO
Director of Data Engineering	SVP - Tech Enablement
Director of Data Platform	SVP AI Transformation Lead- Operations
Director of Enterprise Analytics	<b>SVP and Chief Data and Analytics Officer</b>
Director, AI Product Manager	SVP and Head of Strategic Capabilities
Director, Emerging Technology	SVP of Data Tools & Business Intelligence
Director, Enterprise AI Governance and Enablement	SVP, Data, Analytics and AI
<b>EVP and Chief Information Officer</b>	SVP, Innovation, Payments, & AI
<b>EVP and Chief Revenue &amp; Technology Officer</b>	Technical Product Lead
<b>EVP and Chief Technology &amp; Operations Officer</b>	Vice President & Head, Analytics & Insights
EVP and Head of AI Strategy	Vice President of Product Management
Executive Director	Vice President, AI/ML Products & Platforms
Executive Director of Digital Analytics & Insights	<b>Vice President, Chief Privacy Officer</b>
Executive Director, Head of Digital and Operations AI/ML models	Vice President, Head of AI Business Integration
<b>Executive Vice President, Chief Information Officer, and Chief Digital Officer</b>	VP Business Model Transformation
Global Product Leader - Data Strategy & AI Strategy	VP GenAI
Head of AI	VP Innovation COE, Generative AI
Head of AI CoE	VP of AI Governance and Cybersecurity
Head of Cloud	VP, Data and AI
Head of Diverse Customer Analytics and Insights	VP, Emerging Technology & Innovation
Head of Enterprise AI/ML	VP, Global Responsible AI Product Owner
Head of Enterprise Technology and Experience	VP, Strategic Products

## AI in Finance Leadership Forum at Momentum AI New York

The AI in Finance Leadership Forum is a half day event taking place on April 29th at the Momentum AI New York summit to help financial services institutions develop strategies to scale AI in enterprise and mitigate against the evolving risks in the era of AI.

### ALL TOPICS AND CONTENT SHARED DURING THE FORUM FOCUS ON THREE CORE DELIVERABLES:

Challenges faced > Strategies used > Outcomes achieved

### WHO CAN ATTEND?

Open access for approximately 100 technology executives from financial services institutions.

### OVERVIEW:

- One day open forum on April 29th at the Momentum AI summit New York
- 100 executive attendees
- Speakers include Chief Information Officers, Chief Technology Officers and Chief Data Officers from Fortune 200 financial services enterprises.
- Showcasing unique case studies and interactive roundtable discussions



**Moments that create momentum require collective perspectives. Reuters Momentum curated a diverse group of AI thought leaders to build bridges and ideas to use AI for good"**

**– Marva Bailer, VP, Globality**

## Momentum AI New York agenda themes



### AI Vision and Leadership

Drive organizational transformation through strategic AI adoption and clear innovation roadmaps.



### AI Trust Framework

Build stakeholder trust through ethical AI deployment and robust governance practices.



### AI Business Value

Streamline operations and enhance decision-making through AI-powered automation and analytics.



### AI Competitive Advantage

Develop AI-ready capabilities and modernize infrastructure to maintain market leadership.



## Front-line insights from executives leading AI deployment across every major industry



**Ampily Vijay**  
Chief Digital and  
Technology Officer  
**CBRE Investment Firm**



**Jon Lofthouse** Co-  
Chief Information  
Officer  
**Citi**



**Daniel Barchi**  
CIO  
**CommonSpirit Health**



**Andrea Abell**  
Chief Information Security  
Officer  
**Eli Lilly**



**Jaime Montemayor**  
Chief Digital & Technology  
Officer  
**General Mills**



**Marco Argenti**  
Chief Information Officer  
**Goldman Sachs**



**Ramesh Kollepara**  
Global Chief Technology  
Officer  
**Kellanova**



**Grace Isford**  
Partner  
**Lux Capital**



**Drew Pinto**  
EVP and Chief Revenue &  
Technology Officer  
**Marriott Hotels**



**Greg Ulrich**  
Chief AI and Data Officer  
**Mastercard**



**Matt Studney**  
SVP of IT  
**Merck**



**Pankaj Chopra**  
Vice President & Head,  
Analytics & Insights  
**Mondelez**



**Don Vu**  
SVP and Chief Data and  
Analytics Officer  
**New York Life Insurance**



**Kim Hales**  
Chief Data and AI Officer  
**NRG Energy**



**Kathy Kay**  
EVP and Chief Information  
Officer  
**Principal Financial Group**



**Katya Andresen**  
Chief Digital & Analytics  
Officer  
**The Cigna Group**



**Deepa Soni**  
Chief Information and  
Operations Officer  
**The Hartford**



**Steve Hasker**  
President & Chief Executive  
Officer  
**Thomson Reuters**



**Mojgan Lefebvre**  
EVP and Chief Technology  
& Operations Officer  
**Travelers**



**Desiree Gosby**  
Senior Vice President, Tech  
Strategy, Operations &  
Emerging Technology  
**Walmart**

# Full 2025 Program

AI IN ENTERPRISE			AI IN FINANCE	
APRIL 28		APRIL 29	APRIL 29	
MAIN STAGE		ARRIVAL COFFEES	REGISTRATION	
REGISTRATION		WOMEN LEADING IN AI BREAKFAST	WOMEN LEADING IN AI BREAKFAST	
Plenary: AI Vision and Leadership: Maximizing Innovation for Business Growth		CONNECT   ENGAGE   TRANSFORM SESSIONS	Plenary: AI in Finance: Navigating Innovation, Regulation, and Productivity	
COFFEE BREAK		COFFEE BREAK	COFFEE BREAK	
Plenary: AI Business Value: Accelerating Impact through Operational Mastery	Innovation Hub	Plenary: AI Competitive Advantage: Reshaping Talent Operations and Enterprise Agility	CONNECT   ENGAGE   TRANSFORM SESSIONS	
NETWORKING LUNCH	PRIVATE LUNCH	NETWORKING LUNCH	NETWORKING LUNCH	
Plenary: AI Business Value: Accelerating Impact through Operational Mastery	Innovation Hub		Plenary: Shaping the Future of Finance: Strategic AI Implementation and Vision 2030	
COFFEE BREAK				
Plenary: AI Trust Framework: Aligning Compliance, Governance, and Brand Values				
DRINK RECEPTION				

## Day One | April 28th | Monday

### AI IN ENTERPRISE

#### MOMENTUM AI MAIN STAGE

9:00-9:10

OPENING ADDRESS

Erika Musso, *Head of Momentum AI New York*, **Reuters Events**  
Ryan Patel, *Global Business Executive, Board Director, and Senior Fellow at the* **Drucker School of Management**

9:10-9:50 | Executive Panel Discussion

AI: THE VIEW FROM THE BOARDROOM

As boards of directors navigate the complexities of integrating AI into their organizations, understanding its implications and potential is crucial for guiding future success. In this session we will discuss the unique perspective on how board members perceive AI's role in shaping corporate strategy, risk management, and long-term value creation.

Jaime Montemayor, *Chief Digital & Technology Officer*, **General Mills**  
Ali Keshavarz, *President of Data & Analytics*, **CVS Health**  
Sydney Klein, *SVP, CISO & Head of IT CORE Services*, **Bristol Myers Squibb**  
Moderator: Darren Perry, *Managing Director and Partner*, **L.E.K.**

**9:50-10:10 | Executive Interview****A CONVERSATION WITH KATHI VIDAL, FORMER UNDER SECRETARY OF COMMERCE FOR INTELLECTUAL PROPERTY OF UNITED STATES**

Kathi Vidal, *Former Under Secretary of Commerce and Director of the USPTO*  
Moderator: Jeffrey Dastin, *Technology Correspondent, Reuters News Agency*

This interview is being moderated by a Reuters journalist under the Reuters [Trust Principles](#)

**10:10-10:50 | Executive Panel Discussion****AI 2030: NAVIGATING INVESTMENT TRENDS IN A SELF-DISRUPTING MARKET**

The AI investment landscape continues to evolve rapidly, with DeepSeek's recent open-source model releases exemplifying the shift in development approaches. This democratization of AI technology, combined with substantial institutional investment, is creating a dynamic ecosystem where both enterprise solutions and community-driven innovation flourish. Looking ahead, how will this dual track of development - proprietary and open-source - reshape AI capabilities and investment opportunities? What strategic advantages and challenges might emerge as these parallel paths mature over the next 5 years?

Daniel Barchi, *CIO, CommonSpirit Health*

Grace Isford, *Partner, Lux Capital*

Jeffrey Katzenberg, *Founding Partner, WndrCo*

Moderator: Jeffrey Dastin, *Technology Correspondent, Reuters News Agency*

This panel is being moderated by a Reuters journalist under the Reuters [Trust Principles](#)

**10:50-11:20 | Coffee & Networking Expo****MOMENTUM MAIN STAGE – AI IN ENTERPRISE****11:20-12:10 | Executive Panel****SCALING AI FOR ENTERPRISE-WIDE IMPACT: A ROADMAP TO TRANSFORMATIONAL GROWTH**

As businesses seek to maximize the benefits of artificial intelligence, the challenge lies in scaling these technologies effectively across the organization to unlock their full potential.

Jon Lofthouse, *Chief Information Officer, Citi*

Mojgan Lefevbre, *EVP and Chief Technology & Operations Officer, Travelers*

Drew Pinto, *EVP and Chief Revenue & Technology Officer, Marriott International*

Raj Balasundaram, *Global Vice President, Customer AI Innovation, Verint*

Moderator: Chris Donahoe, *EVP and Head of AI Strategy, Edelman Smithfield*

**11:40– 4:00****INNOVATION HUB – NEW!**

The vibrant hub of creativity and collaboration at Momentum AI.

This dynamic space is designed to foster meaningful connections and spark innovative ideas through engaging roundtables and workshops.

Throughout the day, join fellow visionaries in this interactive environment, where cutting-edge discussions and hands-on learning experiences come together to propel the future of AI in enterprise.

**12:10-12:30 | Executive Interview****IMPACT-DRIVEN AI: LESSONS LEARNED FROM DEPLOYING SOLUTIONS WITH MEASURABLE HUMAN IMPACT**

Sandeep Dadlani, *Chief Digital & Technology Officer, UnitedHealth Group*

Moderator: Ryan Patel, *Global Business Executive, Board Director, and Senior Fellow at the Drucker School of Management*



**12:30-1:30 | Private Lunch****EXECUTIVE PRIVATE LUNCH: DEBUNK TOP AI MYTHS ON AGENTIC AI WITH ARCEE AI**

It's not easy to keep up with the pace of innovation and technology trends happening right now in the GenAI space. On top of that, the messaging around AI solutions is so blurred that it's hard to discern what one does versus the other, who are competitors or collaborators, and what you'd need to do to get started with AI - models, frameworks, hardware, etc...

Join this interactive lunch session with the pioneers of small language models, Arcee AI, to sift through the latest buzz words, like agentic AI or AI agents, to determine what is hype versus reality. Learn what key questions you should be asking and how to equip your team to assess which AI solution is the best fit to drive successful business outcomes for your organization.

**12:30-2:00 | Lunch & Networking****2:00-2:30 | Case Studies****MAXIMIZING AI ROI: BALANCING FISCAL PRUDENCE WITH INNOVATIVE VALUE CREATION**

Unlock the secrets to maximizing AI's ROI by deftly balancing fiscal discipline with groundbreaking innovation, ensuring your investments don't just pay off but propel your organization into the future.

Meaghan Ferrigno, *Senior Vice President and Chief Financial Officer (CFO) and Chief Data and Analytics Officer (CDAO)*, **Destination Canada**

Tom Hale, CEO, **Oura**

Moderator: Nadine Ezzie, Founder + Managing Partner, **ezzie+ co**

**2:00-3:00 | Roundtables****EXECUTIVE ROUNDTABLE: OPERATIONALIZE AI TO DRIVE BUSINESS IMPACT & ROI WITH CELONIS**

We've all heard the promises: AI will revolutionize business. But the truth is, most companies are still gazing at the tip of the iceberg. The real return on investment lies in seamlessly integrating AI into the very fabric of your business processes. Yet, a fundamental challenge persists: AI operates in a vacuum without deep, contextual understanding of your unique processes. Today, no single system provides this crucial insight.

Join Celonis in this interactive roundtable to explore how enterprises can operationalize AI to drive measurable business value. We'll discuss strategies for embedding AI into workflows, overcoming data challenges, and ensuring AI solutions deliver tangible results. Designed for senior IT, Data, and Analytics leaders, this session will facilitate an open discussion on lessons learned, best practices, and the role of Process Intelligence as the backbone of AI success.

**2:30-3:10 | Executive Panel****THE POWER OF ORCHESTRATING AI AGENTS: INTEGRATION, INNOVATION AND IMPACT**

Kim Hales, *Chief Data & AI Officer*, **NRG Energy**

Ramesh Kollepara, *Global Chief Technology Officer*, **Kellanova**

Vikas Jha, *Head of AI Innovation*, **Bloomreach**

Moderator: T. Alexander Puutio, *Adjunct Professor*, **NYU Stern School of Business**

**3:10-3:50 | Executive Panel Discussion****QUANTIFYING AI SUCCESS: METRICS THAT MATTER TO THE C-SUITE**

What specific metrics should be prioritized to reflect AI's impact? How can organizations effectively track performance and adapt strategies based on data-driven insights?

Pankaj Chopra, *Vice President & Head, Analytics & Insights*, **Mondelez**

Don Vu, *SVP and Chief Data and Analytics Officer*, **New York Life Insurance**

Vrinda Menon, *CTO, Managed Account & Client Services*, **JPMorgan Private Bank**

Brian Buchwald, *Global Chair, AI & Product*, **Edelman**

Moderator: Chris Mazzei, *Adjunct Professor*, **NYU Stern School of Business**

**3:50-4:20 | Coffee & Networking Expo****4:20-4:40 | Executive Keynote****AI, TRUST, AND THE FUTURE OF PROFESSIONAL SERVICES**

Steve Hasker, *President & Chief Executive Officer*, **Thomson Reuters**

Moderator: Ryan Patel, *Global Business Executive, Board Director, and Senior Fellow* at the **Drucker School of Management**

**4:40-5:00 | Executive Interview****A CONVERSATION WITH MARCO ARGENTI, CHIEF INFORMATION OFFICER, GOLDMAN SACHS**

Marco Argenti, *Chief Information Officer*, **Goldman Sachs**

Moderator: Jeffrey Dastin, *Technology Correspondent*, **Reuters News Agency**

**This interview is being moderated by a Reuters journalist under the Reuters [Trust Principles](#)**

**5:00-5:40 | Executive Panel Discussion****MITIGATING AI RISK: EXECUTIVE STRATEGIES FOR ROBUST GOVERNANCE AND DATA STEWARDSHIP**

What are the most significant risks associated with AI deployment? How can organizations implement robust data stewardship practices to safeguard against ethical and compliance failures?

Andrea Abell, *Chief Information Security Officer*, **Eli Lilly**

Kathy Kay, *EVP and Chief Information Officer*, **Principal Financial Group**

Jo Ann Davaris, *Chief Privacy Officer*, **Booking Holdings**

Moderator: Chris Donahoe, *EVP and Head of AI Strategy*, **Edelman Smithfield**

**5:40-7:00****NETWORKING DRINKS RECEPTION**



**Day Two | April 29th | Tuesday****CONFERENCE****8:00-9:00 | Breakfast workshop****WOMEN LEADING IN AI BREAKFAST WORKSHOP**

A platform celebrating and connecting women pioneers in artificial intelligence, featuring accomplished executives, researchers, and entrepreneurs sharing their experiences, insights, and vision for the future of AI leadership.

What to expect: Authentic Conversations, Trusted Insights, Meaningful Connections

Josie Cox, *Journalist & Author*, **WOMEN MONEY POWER**

Nina Edwards, *Vice President, Emerging Technology & Innovation*, **Prudential Financial**

Cristina Mancini, *Chief Executive Officer*, **Black Girls Code**

Asha Saxena, *Founder and CEO*, **WLDA**

Rathi Murthy, *CTO*, **Varo Bank**

Moderator: Angelique Mohring, *CEO & Founder*, **GainX**

**Join the waitlist today – Click [HERE](#)**

**MOMENTUM AI CIRCLES - INTERACTIVE SESSIONS FOR AI IN ENTERPRISE**

Following Chatham House Rule, these small-group sessions bring together industry will be led by thought leaders, practitioners, and academics. They create an environment for open dialogue and valuable connections while exploring essential topics in enterprise AI implementation.

**INTERACTIVE SESSIONS****MOMENTUM AI CIRCLES – AI in enterprise****Investment vs. Reality: Why Enterprise AI Breaks at the Point of Execution with Angelique Mohring, Founder and CEO, GainX**

While enterprise AI investment is growing rapidly, many organizations struggle to achieve real competitive advantage through scalable adoption and measurable ROI. In this roundtable, leaders will explore practical strategies to overcome common barriers to AI transformation:

- Addressing systemic misalignment and organizational resistance
- Managing implementation risks and priorities effectively
- Driving measurable, enterprise-wide value from AI initiatives

**MOMENTUM AI CIRCLES – AI in enterprise****Deployment Pitfalls and Ways to Grind Your Agentic Gears to a Halt with T. Alexander Puutio, Adjunct Professor, NYU Stern School of Business**

This candid roundtable discussion will explore common mistakes, unforeseen obstacles, and hard-learned lessons from the frontlines of AI implementation. Participants will share real-world examples of deployment disasters and the strategies they used to overcome them. From data quality issues to ethical dilemmas, we'll cover the full spectrum of potential roadblocks. Come prepared to contribute your own experiences and leave with practical insights to navigate the complex landscape of AI deployment.

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**MOMENTUM AI CIRCLES – AI in enterprise**

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**Accelerating Industrial Innovation with GenAI: Challenges and Opportunities with Carlos A. Escobar, Machine Learning Principal Engineer, Howmet Aerospace**

This session will delve into an in-depth exploration of Generative AI (GenAI) fundamentals, focusing on how core architectures and prompt engineering accelerate industrial innovation. We'll examine the evolution of data in manufacturing, particularly synthetic data generation, and discuss practical implementation strategies. The session will also address critical considerations around data integrity, bias, and ethical deployment of GenAI technologies.

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**MOMENTUM AI CIRCLES – AI in enterprise**

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**AI for the US and EU Businesses and Partnerships with Kelly Zou, CEO, AI4Purpose Inc & Head, Global Medical Analytics and Real-World Evidence, Viatris Inc.**

This roundtable focuses on fostering strategic partnerships between businesses in the United States (US) and European Union (EU) through the transformative power of Artificial Intelligence (AI). Discussions will address collaboration on cutting-edge AI innovations, regulatory alignment, ethical AI deployment, and data-sharing frameworks. Participants will explore opportunities to strengthen transatlantic partnerships, overcome challenges like workforce upskilling and privacy concerns, and harness AI's potential to drive mutual growth, competitiveness, and sustainable development.

**CONFERENCE****10:30-11:00 | Coffee & Networking****11:00-11:20 | Executive Interview****THE NEW ECONOMY: HOW AI IS REDEFINING TALENT AND SKILLS ACCORDING TO LINKEDIN**

Deep dive into how artificial intelligence is fundamentally reshaping the global workforce landscape, transforming traditional skill requirements, and creating new opportunities across industries. Drawing from LinkedIn's unique dataset and economic insights, discover which skills are becoming essential in the AI era and how organizations can prepare for this transformative shift in talent acquisition and development.

Karin Kimbrough, *Chief Economist*, **LinkedIn**

Moderator: Ryan Patel, *Global Business Executive, Board Director, and Senior Fellow* at the **Drucker School of Management**

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**11:20-12:00 | Executive Panel****WORKFORCE TRANSFORMATION: RETHINKING ORGANIZATIONAL DESIGN IN THE ERA OF AI**

As AI transforms the business landscape, organizations must rethink their structures to thrive in this new era. Workforce transformation is crucial for unlocking AI's full potential, enabling agility, fostering innovation, and maintaining a competitive edge.

Katya Andresen, *Chief Digital & Analytics Officer*, **The Cigna Group**

Matt Studney, *Vice President of IT*, **Merck Research Laboratories**

Sandeep Dave, *Chief Digital & Technology Officer*, **CBRE**

Mary Alice Vuicic, *Chief People Officer*, **Thomson Reuters**

Moderator: Angelique Mohring, *CEO & Founder*, **GainX**



**12:00- 12:40 | Executive Panel****AI HORIZON: PREPARING YOUR ENTERPRISE FOR THE NEXT WAVE OF TECHNOLOGICAL DISRUPTION**

In today's digital-first economy, emerging technologies are fundamentally transforming enterprise architecture, strategic decision-making, and competitive dynamics across sectors. Leaders' abilities to evaluate, implement, and scale these technologies will directly impact your organization's market position and operational excellence.

Sears Merritt, *Head of Enterprise Technology and Experience*, **MassMutual**

Desiree Gosby, *Senior Vice President, Tech Strategy, Operations & Emerging Technology*, **Walmart**

Abhijit Bose, *Senior Vice President, Head of Enterprise AI and ML Platforms*, **Capital One**

Moderator: Ryan Patel, *Global Business Executive, Board Director, and Senior Fellow* at the **Drucker School of Management**

**12:40-1:40 | Lunch & Networking****AI IN FINANCE****MOMENTUM AI MAIN STAGE****8:00- 9:00 | Breakfast workshop****WOMEN LEADING IN AI BREAKFAST WORKSHOP**

A platform celebrating and connecting women pioneers in artificial intelligence, featuring accomplished executives, researchers, and entrepreneurs sharing their experiences, insights, and vision for the future of AI leadership.

What to expect: Authentic Conversations, Trusted Insights, Meaningful Connections

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Cristina Mancini, *Chief Executive Officer*, **Black Girls Code**

Asha Saxena, *Founder and CEO*, **WLDA**

Rathi Murthy, *CTO*, **Varo Bank**

Moderator: Angelique Mohring, *CEO & Founder*, **GainX**

**Join the waitlist today~ Click [HERE](#).**

**8:55-9:00 | Opening Remarks**

Dr. Seth Dobrin, *CEO*, **Qantm AI**

**9:00-9:40 | Executive Presentation****THE AI ADVANTAGE: DRIVING OPERATIONAL EXCELLENCE IN FINANCE**

Unlock where the most effective use cases and opportunities are arising to create significant efficiencies from the implementation of AI across financial services.

CXO, **Bank of America**

Leigh-Ann Russell, *Chief Information Officer*, **BNY**

Greg Ulrich, *Chief AI and Data Officer*, **Mastercard**

Matt Minetola, *Global Chief Information Officer*, **Elastic**

Moderator: Alexandra Mousavizadeh, *CEO*, **Evident**

**9:40-10:00 | Executive Presentation****AUGMENTING PRODUCTIVITY: HARNESSING AI IN FINANCIAL WORKFLOWS**

The core focus of any AI strategy is leveraging artificial intelligence to boost productivity effectively. This session will delve into how AI-powered solutions can seamlessly integrate with human expertise to enhance workflow efficiency. We'll explore the perfect balance between human intelligence and AI technologies, demonstrating how this synergy can drive unmatched productivity in financial workflows.

Kate Stepp, *Chief Technology Officer*, **FactSet**

**10:00-10:40 | Executive Panel****THE RISE OF AI AGENTS: LEADING THE NEXT WAVE OF FINANCIAL INNOVATION**

As AI agents become increasingly sophisticated in their ability to process complex financial data and execute decisions autonomously, they represent a critical evolution in how financial institutions operate and compete.

Molly Alter, *Partner*, **Northzone**

Nina Edwards, *Vice President, Emerging Technology & Innovation*, **Prudential Financial**

John Almasan, *Senior Managing Director, Head of AI & Emerging Tech*, **TIAA**

Danial Jameel, *Founder & CEO*, **Saris AI**

Moderator: Dr. Seth Dobrin, *CEO*, **Qantm AI**

**9:40-10:40 | Roundtables****EXECUTIVE ROUNDTABLES WITH THOUGHTWORKS**

Executive Roundtable: Scaling AI in Financial Services: Strategies for Enterprise-Wide Implementation and Risk Management with Thoughtworks

The past two years have seen explosive growth in generative AI, but the success stories still remain elusive for most companies. Those organizations find that the shift from pilot to production faces a number of critical challenges:

1. How do I build great products and solutions?
2. How do I use AI to modernize my state and eliminate legacy systems?
3. Now that I'm building, how do I bring our AI solutions to scale?

Be part of this strategic dialogue on overcoming AI deployment challenges, focusing on practical approaches to building robust AI products, modernizing legacy systems, and scaling AI solutions effectively.

**10:40-11:00 | Coffee & Networking Expo**



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## MOMENTUM AI CIRCLES - INTERACTIVE SESSIONS FOR AI IN FINANCE

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11:00-12:00

Following Chatham House Rule, these small-group sessions bring together industry will be led by thought leaders, practitioners, and academics. They create an environment for open dialogue and valuable connections while exploring essential topics in enterprise AI implementation.

### INTERACTIVE SESSIONS

#### MOMENTUM AI CIRCLES – AI IN FINANCE

**Are we creating significant value from AI?** with Nisha Paliwan, *Author & Advisor* and Michael Proksch, *Chief Scientist*, **AccelerEd**

This session brings together industry leaders, innovators, and thinkers to debate a critical question: Are we truly driving significant value from AI? We'll dive into real-world applications, assess the measurable impact of AI across sectors, and uncover the challenges and opportunities that lie ahead. Expect candid insights, diverse perspectives, and a dynamic conversation about how AI can shape a future of meaningful outcomes.

#### MOMENTUM AI CIRCLES – AI IN FINANCE

**Enhancing Risk Models with AI: Opportunities and Challenges** with Arkin Gupta, *Vice President of Central Risk Book*, **Morgan Stanley**

#### MOMENTUM AI CIRCLES – AI IN FINANCE

**The AI Nexus: The Transformational Power of Suptech & Regtech Convergence**

with Simone di Castri, *Co-Head & Co-Founder, Cambridge SupTech Lab, Cambridge Center for Alternative Finance (CCAF)*, **The University of Cambridge Judge Business School**

The adoption of AI in financial services is transforming both private-sector operations and regulatory oversight. Financial firms use AI to enhance efficiency and risk management, while authorities leverage it for supervision and compliance monitoring. This roundtable explores the evolution of AI adoption, its risks, and benefits across the financial sector.

#### MOMENTUM AI CIRCLES – AI IN FINANCE

**AI-Driven Innovation in Banking: Use Cases and Outcomes** with Alexandra Mousavizadeh, *CEO*, **Evident Insights**

12:40-1:40

**LUNCH & NETWORKING**

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**MAIN STAGE**

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**12:30-1:40 | Private Lunch****EXECUTIVE PRIVATE LUNCH: GENERATIVE AI AGENTS IN ACTION: APPLICATION AND IMPLEMENTATION WITH GENERATIVE-X**

This intimate session offers a unique opportunity to network with fellow executives and gain insights into cutting-edge approaches to enhance operational efficiency, risk management, and customer experience in the financial sector.

Discover how generative AI agents are revolutionizing financial services, from streamlining processes to improving decision-making. Our experts will share real-world case studies, practical implementation strategies, and address key challenges in AI adoption.

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**1:40-2:20 | Executive Panel****BUILD? BUY? APPLY? HOW TO CHOOSE THE BEST OPTIONS FOR YOUR AI DEPLOYMENT**

Navigating the landscape of AI deployment presents a significant challenge for organizations today. Should you build your own solutions, work with third-party vendors or buy existing, readily available technologies? This panel will unpack the nuances of each approach, considering factors like cost, scalability, and alignment with business goals.

Derek Waldron, *Chief Analytics Officer*, **JPMorgan Chase & Co**

Alex Cook, *Senior Vice President and Head of Strategic Capabilities*, **New York Life**

Parker Ence, *CEO & Co-founder*, **Jump**

Jackie Brosamer, *VP, Data & AI Platform Engineering*, **Block**

Moderator: T. Alexander Puutio, *Adjunct Professor*, **NYU Stern School of Business**

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**2:20-2:40 | Executive Presentation****THE CURRENT AI ADOPTION AND MATURITY LANDSCAPE IN FINANCIAL SERVICES**

Get up to the minute insights on the current stage of play in how banks and other financial services companies are ranking in terms of AI leadership, innovation, transparency, talent and adoption. And hear how it's expected to shift through 2025 and beyond.

Alexandra Mousavizadeh, *CEO*, **Evident**

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**2:40-3:20 | Executive Case Studies and Q&A****REAL-WORLD AI USE CASES DELIVERING TRUE VALUE & ROI IN FINANCIAL SERVICES**

Financial services organizations are under increasing pressure to demonstrate tangible returns on their AI investments. This session will present compelling case studies that illustrate how AI is being leveraged to enhance customer experience, create operational efficiencies, and improve risk management.

Peter Hahn, *Chief Technology, Data & Analytics Officer*, **Vantage Risk**

David Wu, *Managing Director - Firmwide AI Head of Product & Architecture Strategy*, **Morgan Stanley**

Harveer Singh, *Chief Data Officer*, **Truist**

Moderator: Nadine Ezzie, *Founder + Managing Partner*, **ezzie+ co**

**3:20-4:00 | Executive Panel****THE 2030 HORIZON. HOW WILL AI CHANGE FINANCIAL SERVICES IN THE NEXT 5 YEARS?**

The future of financial services is being reshaped by AI at an unprecedented pace, but what does that really mean for companies across the sector? In this closing panel, we'll dive into what key finance industry leaders envision for 2030—discussing not just technology advancements but also the cultural shifts required to embrace them.

Ampily Vijay, *Chief Digital & Technology Officer*, **CBRE Investment Management**

Chetan Kandhari, *Chief Innovation and Digital Officer*, **Nationwide**

Geddes Munson, *SVP Engineering*, **Affirm**

Anré Williams, *Senior Executive Advisor*, **American Express**

Moderator: Dr. Seth Dobrin, *CEO*, **Qantm AI**

