



OCE & FINTECH SANDBOX LAUNCH EVENT

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Where Next Happens

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	Case Studies – Data Partners & Fintechs <i>Success stories happen when data providers and fintechs work together for their mutual benefit. Join us for in-depth looks that make the qualitative and quantitative case for the FinTech Sandbox model.</i>
2:20 pm	<ul style="list-style-type: none"> Yodlee – Holly Tishbey, API Program Manager, Chicago Yodlee is an American software company that develops an account aggregation service that allows users to see their credit card, bank, investment, e-mail, travel rewards and other accounts on one screen.
2:30 pm	<ul style="list-style-type: none"> Onist – Brad Kotansky, Co-Founder & CEO Onist is an integrated software platform that facilitates the collaboration between individuals and financial professionals including innovative financial management tools to better manage your family's wealth.
2:40 pm	<ul style="list-style-type: none"> Morningstar – Lawrence Johnson, Head of Fintech Engagement & SVP, Business Development, Chicago Morningstar provides data and research insights on a wide range of investment offerings, including managed investment products, publicly listed companies, private capital markets, and real-time global market data.
2:50 pm	<ul style="list-style-type: none"> Quandl – Abraham Thomas, Chief Data Officer Quandl is a platform for financial, economic and alternative data that serves investment professionals by sourcing from over 500 publishers with all data accessible via an API.
3:00 pm	NETWORKING BREAK
3:25 pm	Panel – Keeping Up with Customers The Revised Payment Services Directive (PSD2) takes effect in Europe next year. This is a major development that aims to make it easier and safer to use Internet payment services and promote the development and use of innovative mobile payment systems. As consumers continue to demand new and better ways to be served and more possibilities for cooperation between fintechs and traditional financial services emerge, what collective strategies and synergies should financial institutions, fintechs and regulators address here at home to compete globally and avoid a zero-sum game? Panel <ul style="list-style-type: none"> Silicon Valley Bank – Win Bear, Managing Director, SVB Financial Group, Boston
3:55 pm	KEYNOTE 2
4:15 pm	Open Mic Fintechs and other participants have 30-45 seconds at the mic to pitch their product, data offering, barrier to entry, partnering need. The floor is yours, but you'll need to be brief!
4:30 pm	Closing Comments
4:30 – 7:00 pm	Networking Reception sponsored by Morningstar