

THE NEW ENGLAND COUNCIL

New England Innovates: Leading the Way in FinTech

September 26, 2018

Bank of America - 225 Franklin Street - Boston, MA

AGENDA

11:30 a.m. **Registration, Networking & Buffet Luncheon**

12:00 p.m. **Welcome and Introductory Remarks**

James Brett

President & CEO, The New England Council

Keynote Remarks and Q&A

Craig S. Phillips

Counselor to the Secretary
U.S. Department of the Treasury

1:00 p.m. **Panel Discussion**

Moderator:

Tim Grady

Financial Services Partner and East Region Assurance Leader
PwC

Panelists:

Jay Biancamano

Managing Director, Digital Product Development
State Street Global Advisors

Jean Donnelly

Executive Director
FinTech Sandbox

Steve Leschuck

Vice President, New Products
Liberty Mutual

George Marootian

Executive Vice President, Head of Technology
Natixis Investment Managers

Debarshi K. Nandy

Associate Professor of Finance
Brandeis International Business School and the Heller School for Social Policy
and Management

1:45 p.m. Audience Q&A

2:00 p.m. Adjourn



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Speaker Biographies

Craig Phillips – Counselor to the Secretary, U.S. Department of the Treasury

Craig joined the Treasury in January 2017 and serves as Counselor to the Secretary. He assists the Secretary in a range of matters including domestic finance, domestic financial institution policy, housing finance policy, and regulatory reform. Previously, he served as a Managing Director and Member of the Global Operating Committee of BlackRock, Inc. He was the global head of the Financial Markets Advisory Group in BlackRock Solutions which provided analytical and risk consulting services to a wide range of private and public sector organizations globally. Clients included central banks, banking supervisors and multi-lateral organizations around the world. Mr. Phillips previously held leadership positions at Morgan Stanley and Credit Suisse First Boston where he managed global securitized product platforms.

Tim Grady – Financial Services Partner and East Region Assurance Leader, PwC

Tim leads PwC's Assurance practice for the East Region and is a client service assurance partner in the Boston office financial services practice, focusing specifically in the asset management sector. In his firm leadership role, Tim is responsible for directing the strategy and operations for the firm's assurance practice across all markets along the East coast. In connection with this role, Tim also serves as Senior Relationship Partner (SRP) to several significant client relationships in the East region. His role as SRP is to engage with the Audit Committee and executive management to solicit and respond to feedback on PwC's team and their performance, as well as provide insights and perspectives on the market and industry.

Jay Biancamano – Managing Director, Digital Product Development, State Street

Jay is part of State Street's Global Technology Services' Digital Product Development and Innovation team in the Americas. Jay has been involved in designing and building several innovative products around new technologies in Capital markets for more than 20 years. These include some of the first algorithmic and analytical trading tools, as well as creating some of the largest Global ATS'. He has held Leadership roles at ITG, Liquidnet, Factset and Fidessa. At State Street Jay is focused on innovating new products and services based on cognitive and blockchain technologies.

Jean Donnelly – Executive Director, FinTech Sandbox

Jean is the FinTech Sandbox Executive Director who comes from Fidelity Investments, GE Capital, and EnerNOC. With a background in insurance operations and process excellence in both financial services and clean tech, she has worked in both small startups as well as established industry makers. Jean likes to get things done whether it be completing business initiatives, reducing turnaround times, or bringing new businesses onboard. She looks forward to assisting FinTech Sandbox build a vibrant community.

Steve Leschuck – Vice President, New Products, Liberty Mutual

Steve Leschuk is a leader in Liberty Mutual's Solaria Labs. Solaria Labs is Liberty Mutual's innovation center, focused on bringing disruptive products to market and embracing emerging technology to enable a better, safer future. Steve's team within Solaria Labs focuses on building and launching new insurance products that anticipate key trends in mobility, shelter, and personal protection. Prior to his time at Liberty Mutual, Steve was a Senior Manager in Deloitte Consulting's Strategy and Operations practice.



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George Marootian – Executive Vice President and Head of Technology, Natixis Investment Managers

George manages the technology function, which includes all areas of infrastructure, software engineering, production operations and technology innovation at Natixis. One of his key areas of focus is on creating a new suite of software applications that can operate on any level of infrastructure, giving Natixis the ability to operate in a more agile way in response to changing market conditions. In addition, Mr. Marootian is leading initiatives to create the next-generation infrastructure model for Natixis, leveraging cloud computing technologies coupled with high performance data centers.

Debarshi K. Nandy – Associate Professor of Finance, Brandeis International Business School and the Heller School for Social Policy and Management

Debarshi is an Associate Professor of Finance at the International Business School of Brandeis University and an affiliated faculty member of the Department of Economics at Brandeis University. His research interests are in the fields of entrepreneurial finance and innovation, corporate finance, and financial intermediation. Nandy's research has been published in leading journals in financial economics, such as the Journal of Financial Economics, the Review of Financial Studies, and the Journal of Financial and Quantitative Analysis.



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