

Requested Attire: Monday - Business / Tuesday - Business Casual

SUNDAY, MARCH 29, 2026

1:00 – 3:45 PM	Board of Directors Meeting & Lunch	Brewster
1:00 – 4:30 PM	Exhibitor Set-up	Atlantic Ballroom
2:45 – 3:45 PM	Co-Chair Meeting	Pacific Ballroom E
3:45 – 4:00 PM	Networking Break	Pacific Ballroom E
4:00 – 5:00 PM	Board & Co-Chair Meeting	Pacific Ballroom E
4:00 – 6:30 PM	Registration Open	Third Floor Foyer
5:00 – 6:30 PM	Welcome Reception in Exhibit Hall	Atlantic Ballroom

MONDAY, MARCH 30, 2026

7:30 – 8:30 AM	Breakfast in Exhibit Hall	Atlantic Ballroom
8:30 – 8:50 AM	Welcoming Remarks & Chair's Address <i>Mike Burg, Master of Ceremonies, ISITC Vice Chair; Paul Fullam, ISITC Chair</i>	Pacific Ballroom A - D
8:55 – 9:10 AM	Keynote Address <i>Gary Chan, Citadel</i>	Pacific Ballroom A - D
9:10 – 9:40 AM	Elevate. From Operations to Advantage: Powering the Next Era of Financial Services <i>Moderator: Sarah Shenton, Access Fintech; Gary Chan, Citadel; Louis Rosato, BlackRock</i> <i>As markets grow faster and more interconnected, resilience is increasingly driven by shared operational intelligence rather than isolated systems. This panel brings together industry leaders to discuss how emerging and mature technologies are transforming core workflows across the trade lifecycle—from pre-trade through post-trade—unlocking efficiency, predictability, and trust at scale.</i>	Pacific Ballroom A - D
9:40 – 10:15 AM	Networking Break in Exhibit Hall	Atlantic Ballroom
10:15 – 10:35 AM	DTCC Innovation Forum - Tokenized Assets and Corporate Actions: The possibilities are just the beginning...	Pacific Ballroom E
10:40 AM – 12:10 PM	Breakout Sessions I	
	Track A: Corporate Actions <i>Delivers key updates from DTCC and SWIFT while outlining industry progress on ISO 20022, corporate actions co existence, preliminary SR2027 change requests, and emerging data elements such as Class Actions and Agent Announcements. It will also address NOAC option ordering and conclude with an open discussion to help firms prepare for upcoming operational and standards changes.</i>	Pacific Ballroom E
	Track B: Settlements - 10:40 – 11:40 AM Shortened Settlement Cycle - Deeper dive on T+1 in the EU & UK - Brings together the Settlements Working Group and the Custodian, Investment Manager, and Broker/Dealer Forums for a deeper examination of the global shift to an accelerated settlement cycle, including the EU and UK's planned move to T+1 in October 2027. Discussion will focus on what firms can do now to prepare, including defining meaningful readiness KPIs and assessing operational impacts across markets.	
	Track B: Settlements - 11:40 AM - 12:10 PM Settlements - Provides updates in regards to ISO 20022 Payments Task force and the Structured Name and Address impacts on Securities Messaging. There will also be an updated on the Comps and Claims subgroup and the Best Practice.	
12:10 – 1:05 PM	Lunch in Exhibit Hall	Pacific Ballroom F - H
1:05 – 1:15 PM	Standard of Excellence Award	

AI at Scale: Real Use Cases Transforming Securities Operations - Can Ops Keep Up?

1:15 – 2:00 PM

Moderator: Joe Piotrowski, MFS; Jacqueline Ecker, State Street Corporation; Michael Sands, Beacon Advisory Partners; Bob Suh, OnCorps AI; Barbara Widholm, State Street Corporation
AI and real-time processing are transforming securities operations from exception handling to predictive analytics. This session will feature real-world case studies of AI deployments that have moved from pilot to production, and examine how operations teams are adapting to 24/7, real-time expectations without sacrificing accuracy or compliance.

2:05 – 2:50 PM

Integrate. Regulatory Whiplash for the Financial Industry: Staying Ahead of Shifting Demands

Moderator: Michele Lieber, FactSet; Panelists: Steve Byron, SIFMA; Thomas Andrew, Brown Brothers Harriman, Elliott Bryson, State Street Corporation
The financial industry is bracing for a period of rapid and overlapping regulatory shifts that will redefine how institutions operate, manage risk, and serve clients. This panel brings together leading policy, regulatory and industry experts to examine the accelerating pace of change across prudential oversight, market-structure reforms, digital-asset and payments policy, climate and sustainability disclosure mandates, operational-resilience requirements, and emerging AI governance frameworks. With global regulators moving on divergent timelines—and often with conflicting priorities—firms face increasing pressure to interpret, adapt to, and anticipate rules before they crystallize. Attendees will gain a forward-looking view of the regulatory landscape—and practical insight into how to stay ahead of the next wave of reforms as the cycle intensifies.

2:50 – 3:15 PM

Networking Break in Exhibit Hall

3:15 – 3:35 PM

TCS BaNCS Innovation Forum - Moving from Exception Queues to Operational Control Planes in Corporate Actions

3:40 – 4:10 PM

Breakout Sessions II

Track A: Broker Dealer

Examines extended trading hours, highlighting the operational, risk, and technology considerations firms must address to support a longer trading day. The discussion will also explore broker metrics and scorecard standardization, focusing on efforts to improve transparency, consistency, and benchmarking across counterparties.

Track B: Digital Asset

Reviews key digital asset trends to watch and invites Forum members to identify the priority topics that should shape future discussions.

4:15-4:45 PM

Breakout Sessions III

Track A: Investment Manager

Provides information on the operating model of tomorrow

Track B: Reference and Data Standards

Provides an intro to Digital Assets and Tokenization in the RD&S space.

4:50 5:35 PM

Elevate. Enabling the Next Generation of Talent

Moderator: Nandana Penukonda, MFS Investment Management; Emily Dollar, Gardner Resources Consulting; Kylie Martin, American Century Investments; Paola Suarez, PGIM

While advances in automation, AI and data analytics have reshaped how work is performed and roles are defined, critical skills like problem-solving, communication and collaboration have become even more significant. Our expert panel will discuss how companies and leaders need to approach the hiring and enabling of the next generation of talent in this rapidly evolving world of work.

5:35-7:00 PM

Cocktail Reception in Exhibit Hall

TUESDAY, MARCH 31, 2026

7:30 – 8:30 AM

Breakfast in Exhibit Hall

8:00-8:30 AM	<p>Elevate. The Art of Well-Being <i>Jason D. Butler, Lesley University</i> <i>In the financial services sector, many pressures and identities people carry aren't visible—mental health concerns, neurodiversity, invisible disabilities, or cultural and personal stresses that shape how they work and connect. This session offers a perspective from the creative arts and psychology, introducing simple reflective and imaginative practices that support grounding, empathy, and resilience. Creative arts use music, dance, drama, visual art, and therapies like art therapy to inspire learning and healing. Participants will explore brief creative exercises that help surface unseen challenges and strengthen well-being in demanding environments. No artistic experience is required—just openness to trying something different.</i></p>
8:35 – 8:50 AM	<p>Integrate. T+1 in EU/UK: The Global Impact <i>Barnaby Nelson, The Value Exchange</i> <i>What do you need to know about T+1 in 2026? With the first wave of market deadlines due in European markets at the end of 2026, now is the time to be driving change in your investment operations. Drawing on recent industry research this update will provide a snapshot of the key areas of risk, focus and activity across the global industry as we prepare for accelerated settlements across Europe, Brazil and Asia-Pacific.</i></p>
8:55-9:40 AM	<p>Innovate. Digital Assets: From Hype to Integration <i>Moderator: Barnaby Nelson, The Value Exchange; Charles Carter, State Street Corporation; Marissa McDonald, BNY; Thomas Sullivan, DTCC</i> <i>Tokenized securities and smart contracts are moving closer to mainstream adoption, but operational readiness remains a challenge. This discussion will focus on custody, clearing, and regulatory integration, sharing lessons from early movers and outlining what it will take for digital assets to live within existing market infrastructure.</i></p>
9:40 – 10:15 AM	<p>Networking Break in Exhibit Hall</p>
10:15 – 10:35 AM	<p>ECS Fin & Swift Innovation Forum</p>
10:40-11:25 AM	<p>Breakout Sessions IV Track A: Regulatory <i>Provides information on the latest developments of key regulations</i> Track B: Securities Lending <i>Explores how T+1 adoption in European markets, DTC auto partialing, and new securities lending market requirements are redefining operational readiness. Attendees will discuss the implications for efficiency, settlement performance, and cross market alignment.</i></p>
11:30-12:15 PM	<p>Breakout Sessions V Track A: Derivatives <i>Provides a general industry update covering Tags & Flags, DMIST developments, and key changes related to OTC Corporate Actions. Discussion will also cover innovations in Derivatives.</i> Track B: Technology <i>Provides a practical overview of quantum computing, comparing gate based and annealing approaches and outlining emerging financial services use cases such as portfolio optimization and risk modeling. It also examines how financial institutions and the broader industry are preparing for quantum readiness as this technology moves closer to real world impact.</i></p>
12:15-1:15 PM	<p>Lunch in Exhibit Hall & Last Visit with Exhibitors</p>
1:00-1:15 PM	<p>Annual Business Meeting</p>
1:15-1:35 PM	<p>Arteria AI Innovation Forum</p>
1:40-2:10 PM	<p>Breakout Session VI – NEW GROUPS! Track A: Repo Clearing <i>Covering the challenges faced in implementing the US Treasury Clearing mandate and the way forward. Views from the covered clearing agencies (CCAs) will be presented by representatives from DTCC, CME and ICE.</i></p>

Track B: Private Markets

Highlights why the Private Markets Forum was created, shares key insights from the latest marketplace study reflecting peer perspectives, and outlines how members can get involved. It concludes with an open discussion and a call for future topics to help shape the forum's ongoing direction.

2:15-3:15 PM

Breakout Session VII

Track A: Navigating the Future of Equity Clearing & Settlement Transformation: What Your Firm Needs to Know for 2026 & 2027

Provides high-level overview of the DTCC Transformation program with a focus on NSCC Equity Clearing and DTC Settlement

3:15- 3:30 PM

Network Break

3:30- 4:15 PM

Innovate. Cybersecurity: How Are You Innovating to Stay Ahead of Cyber Attacks?

Brett Conlon, American Century Investments; Mick Leach, Abnormal AI

Financial operations face increasingly sophisticated cyber threats that target every layer of the ecosystem. This session will explore how firms are deploying advanced detection tools, AI-driven threat modeling, and collaborative intelligence sharing to strengthen defenses. Speakers will share operational strategies for resilience in an environment where the next attack is always evolving.