

FIMA **Financial Information Management**

September 21-22, 2015 · Hyatt Regency Toronto, Ontario



Governance. Execution. Value.

The Premier Reference Data, Counterparty Risk and Data Innovation Conference



Donna Rudnicki
Chief Data Officer
RBC Capital Markets



David Saul
SVP and Chief Scientist
State Street Capital



Cal Rosen
VP, Enterprise Data
Governance and Data
Quality
TD Bank



Linda Dundas
Senior Business
Consultant, Enterprise
Risk Technology
BMO Capital



Takayoshi Wiesner
VP, Global Capital
Markets
Morgan Stanley



Paul Childerhose
Director, Data
Governance
Scotiabank

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“FIMA is the quintessential conference for data management professionals. It is the place where buy-side and sell-side organizations learn about timely and relevant issues facing the data industry and see first-hand solutions from leading global vendors.”

— Ludwig A. D'Angelo, JP Morgan Chase



Why Attend FIMA Canada 2015?

- 1** **2 DAYS, 25+ SESSIONS, 30+ FINANCIAL INDUSTRY SPEAKERS, 10 NETWORKING OPPORTUNITIES** - More content, more networking, and more overall value than any other event in the market
- 2** **LED BY THE LEADERS** - You will hear straight from the leaders in the Canadian financial market including data officers from all of the “big five”
Speakers include:
*Donna Rudnicki, Chief Data Officer, **RBC Capital Markets***
*David Saul, SVP and Chief Scientist, **State Street Capital***
*Cal Rosen, VP, Enterprise Data Governance and Data Quality, **TD Bank***
*Linda Dundas, Senior Business Consultant, Enterprise Risk Technology, **BMO Capital***
*Peter McGuinness, Senior Director, Enterprise Data Management & Process Analytics, **CIBC***
*Paul Childerhose, Director, Data Governance, **Scotiabank***
- 3** **HIGHLY INTERACTIVE FORMAT** - This is a panel discussion and roundtable driven event that invites attendees to share their perspective versus being talked at all day
- 4** **SOME OUTSIDE PERSPECTIVE** - This event will give you a wider scope than ever before, introducing you to data management executives from the US market, Canadian retail banks, and more

“FIMA is a solid industry event. There were a wide range of speakers who spoke about many of the issues I face in data management. I definitely took away a lot from the conference that will help with our data initiatives.”

Sheila Tully, Brown Brothers Harriman

Meet the FIMA Canada 2015 Advisory Board:



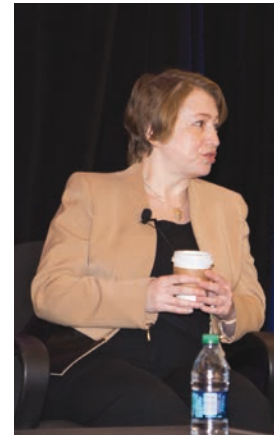
Ludwig D'Angelo, Executive Director, Corporate & Investment Bank Operations, **JP Morgan Chase**

Ludwig D'Angelo manages strategy for the Global Asset Pricing and Instrument Reference Data Operating Unit within JP Morgan's Corporate & Investment Bank Operations. In this role he manages all global and cross line of business initiatives relating to pricing and reference data as well as any industry initiatives in which the bank is engaged. Previously at JP Morgan he was the North American Regional Head for Trading Technology. He has over 30 years of experience in financial services including front office, risk management, operations, technology and marketing. He has previously held senior positions at Swiss Bank Corp, Bankers Trust, Reuters as well as KPMG Consulting and CAPCO where he was a practice leader in trading technology.



Allie Harris, Senior Director, Enterprise Data Management, **CIBC**

Alexis "Allie" Grassie is a Senior Director with the Canadian Imperial Bank of Commerce (CIBC) in Enterprise Process Management and Analytics (EPMA), a ground-breaking department focused providing metrics and measurement of processes in an "end-to-end" fashion. Previous roles within CIBC include data management, governance and analytics for the Wholesale Banking area



Michael Miller, Global Information Architect, **HSBC**

Michael G. Miller is a member of the HSBC Global Finance IT Architecture team acting as a Global Information Architect. He has responsibilities for architecture guidance of Global Finance projects.

Mr. Miller has over 30 years of IT experience in banking, securities and insurance starting in his career computer operations, programming and systems design, and then moving on to consulting roles in enterprise architecture and business intelligence. Michael's previous consulting roles include National Director of Enterprise Architecture and Business Intelligence, Executive Consultant CRM COE, and Principal - Management Consultant. He also teaches a class in Strategic Business Intelligence Implementation for George Washington University in Dubai, UAE.



Rares Pateanu, Adjunct Professor, York University, Former ED, Enterprise Data, **Morgan Stanley**

Rares Pateanu is an Independent Executive Consultant with over 35 years of holding progressively senior roles in the IT industry in R&D, architecture, system software development, applications development, security, customer service, management and marketing. He most recently served as Executive Director managing the Montreal unit of the Enterprise Data & Services division of Morgan Stanley.

FIMA Canada 2015 Speakers Include:



Donna Rudnicki
Chief Data Officer
RBC Capital Markets



Jacklyn Osborne
Americas Chief Data Officer
HSBC



Walt Young
Chief of Data/Analytics,
Group VP, Chief Liquidity Risk
Officer
M&T Bank



Michael Miller
Global Information Architect
HSBC



Linda Dundas
Senior Business Consultant,
Enterprise Risk Technology
BMO Capital



Allie Harris
Senior Director, Enterprise
Data Management
CIBC



Rares Pateanu
Adjunct Professor, York
University, Former ED,
Enterprise Data
Morgan Stanley



Adele Pugliese
Director, Enterprise Data
Governance and
Management
Scotiabank



Peter McGuinness
Senior Director, Enterprise
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Tim Sande
Director, Data Governance
and Knowledge Capture
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Paul Childerhose
Director, Data Governance
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Cal Rosen
VP, Enterprise Data
Governance and Data Quality
TD Bank



Susan Obermeyer
AVP and Data
Governance Officer
Aviva Canada



Marlene Brathwaite
Senior Manager, Data
Management
OTPP



Paul Rowaday
Principal, Director of Data
and Analytics Research
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Executive Director,
Corporate & Investment
Bank Operations
JP Morgan Chase



Takayoshi Wiesner
VP, Global Capital Markets
Morgan Stanley



Marina Severinovskaya
SVP, Business Information
Architecture, CDO &
Enterprise Architecture
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Chris Leung
Senior Manager, Enterprise
Data
CPPIB



David Saul
SVP and Chief Scientist
State Street Capital



Rick Kochhar
Former SVP and Chief Data
Officer
TD Bank



Alan Paris
Principal, Financial Services
eClerx



Alex Olson
Managing Director
Kingland Systems



Kevin Strange
Director, Enterprise
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Monday, September 21, 2015

Main Conference Day One

Data Strategy and Data Governance

7:50	Continental Breakfast & Registration In The Solutions Zone	10:00	PANEL: The Evolution Of The Chief Data Office And Officer: Where Is It Headed? <ul style="list-style-type: none"> Build a cross-functional Chief Data Office that reaches the global organization Create a CDO role that sits at the c-suite table in every way and understand the implications of that Insights on how the CDO role will mature and change over the next 3-5 years
8:40	Welcome Remarks Caroline Berger Event Director FIMA Canada 2015		Donna Rudnicki Chief Data Officer RBC Capital Markets
8:45	Chairperson's Opening Address Alan Paris Principal, Financial Services eClerx		Jacklyn Osborne Chief Data Officer, Americas HSBC
9:00	KEYNOTE: Following In Their Footsteps: Thought Leadership On Data Governance From TD Bank Join this keynote to hear about: <ul style="list-style-type: none"> The journey TD Bank took to become a leader in the governance space What the future holds for the industry and how to tackle the changing landscape How to lead a data management change across an organization 		Walt Young Chief Data Architect M&T Bank
	Cal Rosen VP, Enterprise Data Governance and Data Quality TD Bank	10:40	Morning Refreshment & Networking Break In The Solutions Zone
9:20	KEYNOTE: Data Governance Should Be Your Number One Priority This Year: Here's Why... Join this keynote to hear about: <ul style="list-style-type: none"> What changed this year? Why you should put your resources behind a good data governance plan Understand the common execution mistakes and how to avoid them Best practices in turning your data governance into a long term sustainable strategy 	11:10	KEYNOTE: Semantic Standards Enable Financial Data Synergy Financial services companies want to develop new data analytics products and services for their clients. The increasing complexity and cost of global regulatory compliance diverts attention and resources from those efforts. The development of data standards, through industry partnerships like the Enterprise Data Management (EDM) Council, when combined with semantic technologies creates a synergy that can address both requirements. Development of the Legal Entity Identifier (LEI) from a regulatory mandate is one example of how public/private collaboration can work to the benefit of both. The Financial Industry Business Ontology (FIBO) is an emerging standard from the Object Management Group (OMG) that exploits semantics to describe data so that it can be used for both data analytics and risk management. Semantic data standards enhance data governance through their ability to create transparency both internally and externally.
	Michael Miller Global Information Architect HSBC		David Blaszowski SVP, Head of Data Governance State Street Capital
9:40	KEYNOTE: Using Data Governance And Data Quality To Drive A 360 Degree Customer View Join this keynote to hear about: <ul style="list-style-type: none"> Improving the customer experience through an end to end data governance strategy Tracking your data to gain a better understanding of what your customers are looking for Mitigating risk through robust and quality data 		David Saul SVP and Chief Scientist State Street Capital

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Day One Continued

11:30 | **CASE STUDY: Analytics Bottleneck: Battling the Unfortunate Shape of Big Data**

Big data issues are just now impacting the global markets landscape;

- The extreme growth of data for the foreseeable future distorts conversion rates of that data into new (and in some cases, desperately needed) analytics;
- The increasing complexity of big data for capital markets use cases means that virtually no firm will possess the capability to manage big data challenges without the help of content aggregation and platform management partners; and
- A much more collaborative community of (both internal and external) specialists is representative of a new enterprise data management (EDM) strategy going forward.

Paul Rowady
Principal, Director, Data and Analytics Research
TABB Group

11:50 | **PANEL: Put Your Money Where Your Mouth Is: Getting The Buy-In And Resources You Need To Realize Your Plan**

- Message your data governance plan to the right audience at the right time
- Understand what your operations teams need from you to get the job done
- Create a culture of ownership among your larger organization

Tim Sande
Director, Data Governance, and Knowledge Capture
ATB Financial

Susan Obermeyer
AVP and Data Governance Officer
Aviva Canada

Alex Olson
Managing Director
Kingland Systems

12:30 | **Lunch for All Attendees**

CONCURRENT SESSIONS	
STREAM 1: DATA GOVERNANCE MODELS & ARCHITECTURE	STREAM 2: DATA QUALITY & STANDARDS
1:30 Chairperson's Afternoon Address	Chairperson's Afternoon Address
1:35 CASE STUDY: How To Merge Your Legacy Systems With Your New Applications	CASE STUDY: What Does It Look Like When You All Work Together?
<ul style="list-style-type: none"> • Push through your backlog of data and organize it into digestible information • Find solutions that will work symbiotically with your current architecture • How to make the most of what you already have <p>Paul Childerhose Director, Data Governance Scotiabank</p>	<p>Key data quality takeaways from functional data management relationships from NBC's Emmanuel Kiyanda</p> <ul style="list-style-type: none"> • What do your bankers need to become data governance advocates? • Partner with other functions most effectively to implement your data strategy • What is getting lost in translation between the data management team and the rest of leadership? What is frustrating everyone? <p>Emmanuel Kiyanda Senior Manager, Market Parameters, Financial Markets & Securities National Bank of Canada</p>
1:55 INNOVATION SPOTLIGHT	INNOVATION SPOTLIGHT
<p>Rapid-fire briefings from cutting-edge data solution providers. To host an Innovation Spotlight, contact Tom Ciccone at Tom.Ciccone@wbresearch.com or call him at 646-200-7947.</p>	<p>Rapid-fire briefings from cutting-edge data solution providers. To host an Innovation Spotlight, contact Tom Ciccone at Tom.Ciccone@wbresearch.com or call him at 646-200-7947.</p>

Day One Continued

2:15

PANEL: Data Governance: Time To Get Pragmatic

- Understand your organization’s maturity level and tailor your governance accordingly
- Avoid the mistakes banks have made before you
- How does data help you respond to crises?

Tim Sande
Director, Data Governance, and Knowledge Capture
ATB Financial

John Fleming
Global Head of Data Governance
BNY Mellon

Adele Pugliese
Director, Enterprise Data Governance & Management
Scotiabank

PANEL: How Data Quality Will Grow Up Over The Next Decade

- Create a process to define your data quality standards based on future enterprise goals
- Which standards will stick around over the next 10 years?
- Which won't?

Linda Dundas
Senior Business Consultant, Enterprise Risk Technology
BMO Capital

Victor Dudemain
AVP, Data Architecture and Business Intelligence Services
Sun Life Financial

2:55

Afternoon Refreshment & Networking Break In The Solutions Zone

3:25

INNOVATION SPOTLIGHT: Intelligent Data Quality Diagnostics

Tony Brownlee
Partner
Kingland Systems

- What are your other options?

Rares Pateanu
Adjunct Professor
York University

Dulcie Pinto
VP, Enterprise Data Management
Scotiabank

3:35

PANEL: What Does Your Data Governing Body Look Like? Where Does It Fit In?

- Centralized or de-centralized? What are the benefits and pitfalls to having a centralized data management and data governance team vs. a de-centralized one?
- Is one structure more effective than the other? And which structure is right for your organization?

4:15

ROUNDTABLES: Interactive Roundtable Discussions

This is your opportunity to break into small groups and brainstorm with your peers on specific topics around Data Management. Topics TBA.

5:15

Cocktail Reception

6:45

End of Main Conference Day One



Tuesday, September 22, 2015

Main Conference Day Two

Data Management, Regulation and Compliance

7:50	<p>Continental Breakfast</p>	9:40	<p>KEYNOTE: The Rise Of The Data Scientist</p> <ul style="list-style-type: none"> • Defining the Data Scientist role and what it can do for you. How vital is it to your strategy? • What is the benefit of data scientists who mine data vs. traditional predictive modeling? • What industries nurture the best data scientist? How do you recruit in such a small pool? <p>Takayoshi Wiesner VP, Global Capital Markets Morgan Stanley</p>
8:40	<p>Welcome Remarks</p> <p>Caroline Berger Event Director FIMA Canada 2015</p>	10:00	<p>PANEL: What Do This Year's Regulatory Changes Mean For Your Data Strategy?</p> <ul style="list-style-type: none"> • Where should you be right now to hit your Basel III requirements? What do you need to get there? • What cross-geographical policies should you be looking out for? What kind of impact will they have on the Canadian market? • Learn from those who came before you – tackling the stress tests <p>Allie Harris Senior Director, Enterprise Data Management CIBC</p> <p>Marina Severinovskaya SVP, Business Information Architecture, CDO & Enterprise Architecture Citigroup</p> <p>Kevin Strange Director, Enterprise Solutions S&P CapitalIQ</p>
8:45	<p>Chairperson's Opening Address</p>	10:40	<p>Morning Refreshment & Networking Break</p>
9:00	<p>KEYNOTE: A Cross-Industry Approach: Data Lessons Learned from Cross-Industrial Experience</p> <p>Hear Rick Kochhar's unique perspective in data management and governance that delineates the value of a strategic approach, relating to his diverse experience in pharmaceuticals, aerospace, oil and waste management.</p> <p>Rick Kochhar Former SVP and Chief Data Officer TD Bank</p>		
9:20	<p>KEYNOTE: Change The Mindset Of Your Data Office From Reactionary To Progressive</p> <ul style="list-style-type: none"> • Turn your regulatory parameters into proactive organizational goals • Take regulations as a guideline for future growth. How do you take their steps even further? • Analyze what investments to make to set your team up for continued progress beyond regulatory necessity <p>Ludwig D'Angelo Executive Director, Corporate & Investment Bank Operations JP Morgan</p>		



Day Two Continued

CONCURRENT SESSIONS	
STREAM 1: MANAGEMENT BEST PRACTICES	STREAM 2: DATA INNOVATION
11:10	<p>Chairperson's Afternoon Address</p>
11:15	<p>CASE STUDY: What Global Leis Mean For Your Business And The Market At Large</p> <ul style="list-style-type: none"> • What are the fundamental principals of data management for the LEI? • Best practices for onboarding new clients onto new identifiers • How to coordinate LEIs with pre-existing identifiers <p>Allie Harris Senior Director, Enterprise Data Management CIBC</p>
11:35	<p>INNOVATION SPOTLIGHT</p> <p>Rapid-fire briefings from cutting-edge data solution providers. To host an Innovation Spotlight, contact Tom Ciccone at Tom.Ciccone@wbresearch.com or call him at 646-200-7947.</p>
11:55	<p>PANEL: Building Consensus: Getting All Company Parties On The Same Page</p> <ul style="list-style-type: none"> • Everyone should feel ownership, what are you responsible for? • Building models that your operational counterparts can get behind • Creating a results oriented relationship within the boundaries of your function <p>Chris Leung Senior Manager, Enterprise Data CPPIB</p> <p>Marlene Brathwaite Senior Manager, Data Management OTPP</p>
12:35	<p>Lunch For All Attendees</p>
1:35	<p>ROUNDTABLES: Interactive Roundtable Discussions</p> <p>This is your opportunity to break into small groups and brainstorm with your peers on specific topics around Data Management. Topics TBA.</p>
2:35	<p>Afternoon Refreshment & Networking Break</p>
3:05	<p>PANEL: The Retail Bankers: Learning From The Other Side Of The Organization</p> <ul style="list-style-type: none"> • How does customer data interact with reference data? What kind of relationship does it have? • Drawing customer journey conclusions from retail banking data • Best practices in data quality from your data counterparts
3:45	<p>KEYNOTE: How Do They Do It? How The Pharma Industry Tackles The Same Data Management Hurdles</p> <ul style="list-style-type: none"> • Pharma data can look a lot like financial data. How do they face their governance and quality challenges? • Best practices from their data culture and ethos • Key takeaways from their data management. How can you think about it differently?
4:05	<p>Conclusion Of FIMA Canada 2015</p>

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