Are you Ready to Meet the Minds Behind the Financial AI Revolution in Boston?

Join us at the forefront of financial innovation and be part of the conversation shaping the future of finance

The AI in Finance Boston Summit is the **perfect platform** to connect with the **visionaries** who are at the **forefront of this revolution**. Whether you're a seasoned data scientist or a curious business leader, this event offers an unparalleled opportunity to **network with pioneers** who are **redefining financial services**.

Don't miss your chance to **gain insights** from the **experts** who are **leading the charge** in financial AI and **unlock the potential** of this technology to **drive growth and efficiency** in your organization.

WHAT'S NEW FOR 2024?
Learn about the latest AI/ML technologies and strategies being used to drive innovation and efficiency.   **Be part of a dynamic community driving innovation in AI and ML within Boston.** The summit fosters collaboration and discussion, shaping the future of this transformative technology.   **Hear from industry experts and thought leaders on how to implement AI to revolutionize** strategies for sustained success and future-proofed growth.   - Gain a competitive edge by equipping your team with AI-driven tools and strategies.   **Connect with a global network of AI/ML professionals** who are working through the same challenges and exploring AI solutions.   **Discover unique insights and technical use cases from AI specialists** and data scientists.   **Stay up to date on the latest AI research discoveries** and practical directives to implement them in your business.

AI in Finance Boston Summit 2024 Key Themes:

- THE FUTURE OF AI IN FINANCE: *Discover what top industry leaders think of the future of AI in the financial sector.*
- FRAUD DETECTION: *Learn the latest about how AI is helping combat Fraud Detection in the BFSI industry.*

- **CUSTOMER CENTRIC FINANCE:** *Understand how AI is used to personalize and improve customer financial products and services.*
- **AI REGULATIONS:** *Stay current on the latest regulatory developments and best practices for the use of AI in the financial industry.*
- **IMPLEMENTING AI IN YOUR BUSINESS:** *Learn from experts on how to develop and implement an effective AI strategy for your organization.*

Speakers confirmed:

- Douglas Hamilton, *Head of AI Research & Engineering*, **Nasdaq**
- Josep Puig Ruiz, *Sr. Manager -Data Science*, **Nasdaq**
- Barbara Widholm, *Vice President, Automation & Artificial Intelligence*, **State Street**
- Zhang Zhang, *Head of AI and Risk*, **Polen Capital**
- Anurag Setty, *Team Leader, Data Science*, **Rocket Mortgage**
- Diego Pavez, *Senior Data Scientist*, **BCI Bank**
- Suzet Nkwaya, *Data Scientist*, **MFS Investment Management**
- Amin Assareh, *VP of Data Science*, **Fidelity Investments**
- Abhishek Yeluri, *Senior Machine Learning Engineer*, **Rocket Mortgage**
- Preethi Raghavan, *Vice President of Artificial Intelligence*, **Fidelity Investments**
- Het Mistry, *Senior Business Intelligence Analyst*, **Navy Federal Credit Union**
- Vinod Goje, VP Engineering Manager, **Bank of America**
- Christine Greenleaf, *Product Manager*, **Symetra**
- Langyi Tian, *Senior Data Scientist*, **Homesite Insurance**

AI in Finance Boston Summit 2024 | AGENDA
DAY ONE – November 13, 2024
Boston

8:00am	*Registration & Open Networking in the Exhibition Area*
8.50am-9:00am	**WELCOME NOTE & OPENING REMARKS**
9:00am - 9:30am	**Keynote Presentation: AI and ML for Innovation in Financial Products: Case Studies and Future Directions** • How AI and ML are revolutionizing traditional financial products and services, such as lending, insurance, and wealth management? • Discovering the potential of AI and ML to create new revenue streams and improve profitability for financial institutions • The future directions of AI and ML in financial products, emerging technologies and potential applications Douglas Hamilton, *Head of AI Research & Engineering* **Nasdaq**
9:30am - 10:00am	**Keynote Presentation: Crossing the AI Regulatory Landscape: A Comparative LLM Analysis** • What are the key challenges banks face in keeping up with the rapidly evolving landscape of AI regulations? • How can Large Language Models (LLMs) be leveraged to streamline the process of comparing and analyzing AI regulations? • What are the specific benefits of using LLMs for regulatory compliance, particularly in terms of efficiency, accuracy, and insights gained? Preethi Raghavan, *Vice President of Artificial Intelligence*, **Fidelity Investments**

10:00am – 10:40am	**Panel Discussion: New Trends in the Next Chapter of Data and AI: The Evolution and Impact on the Financial Services Industry** • What is the next chapter in the usage of Data in AI? • What is the next chapter in AI with respect to the framework of models, computational infrastructure, and social implications? • How do these new trends in Data and AI improve customer experience, risk management, and operational efficiency in the financial services industry? **Panelists:** Amin Assareh, *VP of Data Science*, **Fidelity Investments** Het Mistry, *Senior Business Intelligence Analyst*, **Navy Federal Credit Union** Christine Greenleaf, *Product Manager*, **Symetra**
10:40am – 11:00am	*Mid-Morning Coffee Break & Networking in Exhibition Area*
11:00am - 11:40am	**Panel Discussion: Generative AI in Action for Banks: The Successful Application of Generative AI in Production** • Providing an overview of how Generative AI is currently being used in production within the banking sector? • What are the key benefits that Generative AI offers to banks in terms of production efficiency and customer experience? • What are some of the challenges that banks face when implementing Generative AI in production? • How can these challenges be overcome, and what are some best practices for successful implementation? **Panelists:** Barbara Widholm, *Vice President, Automation & Artificial Intelligence*, **State Street** Abhishek Yeluri, *Senior Machine Learning Engineer*, **Rocket Mortgage** Diego Pavez, *Senior Data Scientist*, **BCI Bank** Vinod Goje, *VP Engineering Manager*, **Bank of America**
11:40am- 12:10pm	**Keynote Presentation: Transforming Transactional Enrichment with Traditional AI Models and LLM Ensemble for Enhanced Banking Insights** • The Need for Transactional Enrichment • The End-to-End Transactional Enrichment Process • Benefits and Impact of Transactional Enrichment Diego Pavez, *Senior Data Scientist* **BCI Bank**
12:10pm 12:40pm	**Keynote Presentation: Preparing for Homeownership: Financial Guidance Powered by Generative AI** Generative AI (Gen AI) especially LLMs are giving the homeownership journey a much-needed upgrade by transforming financial guidance into a personalized, data-driven experience. Aspiring homeowners often face overwhelming financial complexities when planning for a mortgage, from understanding credit scores to managing long-term savings strategies. The challenge is to provide personalized, clear financial guidance that simplifies this process while adapting to individual circumstances. Gen AI can provide a more efficient, informed, and confident approach to homeownership by streamlining decision-making and making financial planning more accessible. In this talk we explore ways in which the current landscape of Gen AI product offerings are delivering value to end users in the home aspirant segment. Anurag Setty, *Data Scientist* **Rocket Mortgage**

12:40pm – 2:00pm	*Lunch & Networking in Exhibition Area*
2:00pm- 2:30pm	**STARTUP SHOWCASE: Innovative AI Solutions from Emerging FinTech's** Discover groundbreaking AI technologies from startups aiming to transform finance. Innovation Slot 1: Innovation Slot 2: Innovation Slot 3:
2:30pm – 3:00pm	**Keynote Presentation: NLP in Fintech: How Large Language Models are Transforming the future of Fintech** • Identifying how LLMs are transforming the analysis of unstructured financial data • How LLMs are enabling the development of innovative fintech product • Reviewing the current NLP trends and latest SOTA algorithms Overview of the latest NLP algorithms and industry use cases that are easier to solve using the open-source NLP methods Suzet Nkwaya, *Data Scientist* **MFS Investment Management**
3:00pm – 3:30pm	*Afternoon Coffee Break & Networking in Exhibition Area*
3:30pm- 4:00pm	**Keynote Presentation: Understanding When Not to Use Generative AI in the Financial Services Sector?** • Misusing GenAI diminishes the value of AI in organizations • Determining whether GenAI makes sense for your use case • Considering alternative AI techniques • Combining GenAI models with AI other techniques Zhang Zhang, *Head of AI and Risk* **Polen Capital**
4:00pm- 4:30pm	**Keynote Presentation: Customer-Centric Insurance: Personalizing Experiences with AI** • How AI is transforming customer engagement with personalized insurance offers • Leveraging chatbots and virtual assistants for 24/7 customer service • Using ML to predict customer needs and offer proactive solutions
4:30pm- 4:40pm	**Chairperson Closing Remarks**

AI in Finance Boston Summit 2024 | AGENDA
DAY TWO – November 14, 2024
Boston

8:00am- 9:00am	*Registration & Open Networking in the Exhibition Area*
9:00am- 9:10am	**WELCOME NOTE & OPENING REMARKS**
9:10am - 9:40am	**Keynote Presentation: AI Governance and Risk Management in Banking** • An overview of the AI regulatory and legal landscape affecting the Banking sector • The importance of having an AI Governance program to manage AI-related risks • Key components of an AI Governance program and a practical approach to assess and mitigate AI-related risks

Time	Session
9:40am 10:10am	**Keynote Presentation: Looking to the Future and Beyond: A Brave New World of AI in Insurance** • What are the most significant opportunities that AI presents for insurance companies today? • How can insurance companies effectively integrate AI into their existing systems and processes? • What role does AI play in personalizing insurance products and services for individual customers? • What ethical considerations should insurers keep in mind when deploying AI technologies?
10:10am - 10:40am	**Keynote Presentation: Leveraging AI for Smarter Fraud Prevention: Anticipating and Mitigating Threats** • How can you level up your existing anti-fraud systems? • What are the latest advancements of AI in the fraud detection industry? • What to expect in the coming years
10:40am – 11:00am	*Mid-Morning Coffee Break & Networking in Exhibition Area*
11:00am – 11:30am	**Keynote Presentation: How can AI help Leaders Drive their Businesses Forward in the Coming Years?** • Identifying the current challenges facing by leaders, such as rising competition, security threats, and customer experience demands. • The emergence of Artificial Intelligence as a game-changer in this environment • Guiding leaders on evaluating their current processes to identify areas ripe for AI integration • Encouraging leaders to embrace AI as a strategic tool for driving innovation and growth
11:30am- 12:00pm	**Keynote Presentation Developing a Multidisciplinary Workforce Skilled in Collaborative AI** • Building AI infrastructure and training resources • Crafting multi-modal AI/ML tools and tutorials to enhance capabilities in analyzing complex data • Cultivating environments of collaboration and innovation
12:00pm- 1:30pm	*Lunch & Networking in Exhibition Area*
1:30pm- 2:00pm	**Keynote Presentation: Delivering ROI on AI & ML Initiatives to Secure Long-Term Investment** • Proving the real value of initiatives as fast as the business expect • Is there a right balance between the emphasis on AI tools, technologies and models, vs ensuring teams spend enough time on measuring incremental value of AI projects? • Balancing short-term wins with long-term success • Key steps towards addressing and improving return on investment
2:00pm- 2:30pm	**Keynote Presentation: Scaling Trustworthy AI to Create Tangible Business Value** • Customer-centric digital banking solutions require organized and trusted data that is business-ready for analytics and AI model building • Sourcing, identifying, and prioritizing high-value AI projects throughout the organization • Building a team at scale: acquisition and development of world-class talent • Ensuring topics such as fairness, explainability & ethics are properly addressed
2:30pm	**Chairperson Closing Remarks**