RE·WORK
APRIL 15-16, 2025 | NEW YORK CITY
AI in Finance Summit NY
237 Park Ave.
REGISTER NOW

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

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

The AI in Finance New York 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 2025?
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 NYC**. 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 New York 2025 Key Themes:

- **THE FUTURE OF AI IN FINANCE:** *Discover what top industry leaders think of the future of AI in the financial sector.*
- **CUSTOMER CENTRIC FINANCE:** *Understand how AI is used to personalize and improve customer financial products and services.*
- **IMPLEMENTING AI IN YOUR BUSINESS:** *Learn from experts on how to develop and implement an effective AI strategy for your organization.*

Speakers Confirmed:

- Lingchen Guo, *to Senior Director, Intelligence and Data Solutions*, Visa
- John Chan, *Director of Technology - AI/ML*, Raymond James
- Touseef Habib, *Vice President-Generative AI Practice*, PNC
- Dhagash Mehta, *Head of Applied Machine Learning Research*, Black Rock Management
- Leonard Hawkes, *Software Engineer*
- Koosha Golmohammadi, *Executive Director of Data Science*, JPMorgan Chase & Co
- Georgios Samakovitis, *Professor of FinTech*, Greenwich University
- Sumedha Rai, *Data Scientist*, New York University
- Cecilia Dones, Former Adjunct Assistant Professor, Columbia Business School
- Sateesh Kumar C, *Head of Digital Transformation Office*, Societe Generale
- Harry Mendell, *Data Architect Technology Group*, Federal Reserve Bank of New York
- Richa Singh, *Director and Head of Data and AI*, Lexington Partners
- Miranda Jones, *SVP, Data & AI Strategy Leader*, Emprise Bank
- Argyro Tasitsiomi, *Head of AI & Investments Data Science*, T. Rowe Price
- Aishwarya Ashok, *Senior Data Scientist*, PURE Insurance
- Arkin Gupta, *Vice President*, Morgan Stanley
- Varun Pandey, *Vice President, Payments Technology*
- Varun Awasthi, *Vice President,*
- Santosh Kumar Nayak, *Lead Software Engineer,*
- Dyuti Dave, *Technology Analyst*, Barclays PLC
- Marsal Gavalda, *Chief Technology Officer*, Clarity AI
- Karamjit Singh, *VP of Artificial Intelligence*, Mastercard
- Haonan Wang, *Principal Machine Learning Engineer*, GoFi
- Tyler Frieling, *Director Emerging Technologies*, Blackrock
- Akhil Khunger, *VP Quantitative Analytics*, Barclays
- Tomasz Noetzel, *Senior Equity Analyst*, Bloomberg Intelligence
- Kristi Kunworee Baishya, *AI Product Lead*, Nomura Holding America
- Terrence Muthoka, *Senior Data Scientist*, Citi
- Frederic Repond, *Vice President, Strategy & Innovation*, Prudential
- Maddie Daianu, *Head of Data & AI*, Intuit Credit Karma
- Snehit Cherian, *VP, CTO*, Global Nexis Solutions, LexisNexis
- JP Lugo, *Senior Solution Architect*, Verato
- Steve Cotton, *RVP of Emerging Markets - Financial Services*, Verato
- Michael Cornwell, *CTO*, Pure Storage
- Pravin Kumar, *Intelligent Automation Leader, (RPA) & AI*, First Horizon Bank
- Mark Zabezhinsky, *Director, Product Marketing*, Alteryx
- Jacob Shamis, *Vice President Marketing*, Stride
- Michael Wytock, *Principal Software Engineer*, Stride
- Michael Spencer, *Director of Field Application Engineering in Solution Enablement*, Supermicro
- Kara Marin, *Regional Sales Director, East,* Glean
- Rei Araki, *CEO*, Generative X
- Hiroki Ida, *COO*, Generative X
- John Heisler, *Senior AI/ML Architect, Applied Field Engineering*, Snowflake
- Maya Ross, *VP, Product Management,* GitHub
- Mike Chasteen, *SVP of Sales and Customer Success*, Base64.ai
- Drew Cukor, *Chief Data & Analytics Officer,* TWG Global
- Maya Ross, *VP, Product Management*, GitHub

AI in Finance New York 2025 | AGENDA
DAY ONE – April 15, 2025
New York

Time	Session
8:00am – 9:00 am	*Registration & Open Networking in the Exhibition Area*
09.00am- 9:10am	**WELCOME NOTE & OPENING REMARKS:** Cecilia Dones, Former Adjunct Assistant Professor, **Columbia Business School**
9:10am - 9:40am	**Keynote Presentation: Reinventing the Future of Financial Services with AI/ML** • How AI/ML is leveraged to enhance customer interactions in financial services through personalized recommendations, AI-driven chatbots, and predictive analytics, creating more engaging and efficient customer experiences? • Exploring how AI/ML technologies are improving the financial product cycle and enabling the creation of new financial products and services • What key factors must be balanced to ensure the successful and responsible implementation of AI? Lingchen Guo, *to Senior Director, Intelligence and Data Solutions* **Visa**
9:40am - 10:10am	**Keynote Presentation: Extracting Truth From Fiction: Developing Synthetic Datasets for AML/ FinCrime - The Future and Significance of "True Data" in FinCrime model training** Motivated by persistent pressures in counter-FinCrime, the session will address synthetic dataset generation typologies and their efficacy in fraud and money laundering use cases, as an area of growing interest. Boosted by new Generative AI capabilities, the option for tailoring datasets to desired use cases for model training, opens new avenues for enhanced coverage of possible fraud landscapes. Simulated datasets promise to overcome the 'Collective Intelligence conundrum', that is, the inability to share transaction data for knowledge discovery across networks, on account of PII protection and privacy constraints. The questions now become more acute as to (i) how useful synthetic data can be to train models, as measured for utility, privacy and fidelity, and (ii) what are the limits between generative capability and data representativeness - and how far we can and should go with simulated data. Georgios Samakovitis, *Professor of FinTech* **Greenwich University**
10:10am – 10:40am	**Keynote Presentation: Driving Data-Centric Outcomes as a Competitive Edge** Data has long been a cornerstone of competitive advantage in the financial services industry. Today, as firms navigate the fine line between breakthrough technological advancements, such as AI, and the complexities of regulatory compliance, the need for innovative, data-driven strategies has never been greater. Balancing cutting-edge technology with regulatory demands is essential to unlocking new opportunities and driving meaningful outcomes. This session explores industry-leading performance for HPC and AI workloads, highlighting their transformative impact on banking. It delves into how high-performance data platforms are becoming the secret weapon for gaining a competitive edge, enabling faster insights, more intelligent decision-making, and more agile financial strategies. Michael Cornwell, *CTO*, **Pure Storage**
10:40am – 11:10am	*Mid-Morning Coffee Break & Networking in Exhibition Area*
11:10am - 11:50am	**Panel Discussion: Shaping the Future: Emerging Trends in Data and AI Transforming Financial Services** • 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:* John Chan, *Director of Technology - AI/ML*, **Raymond James** Karamjit Singh, *VP of Artificial Intelligence*, **Mastercard** Harry Mendell, *Data Architect Technology Group*, **Federal Reserve Bank of New York** Pravin Kumar, *RPA & AI Expert*, **First Horizon Bank** **Moderator:** Snehit Cherian, *VP, CTO*, **Global Nexis Solutions, LexisNexis**
11:50am- 12:20pm	**Keynote Presentation: Applying GenAI Agents to Unlock Operational Efficiency at Scale** • Why financial operational processes are uniquely suited to agent-based automation • Core agent capabilities that align with operational workflow challenges • Applied patterns for agentic use cases Koosha Golmohammadi, *Executive Director of Data Science* **JPMorgan Chase & Co**
12:20pm - 01:00pm	**Panel Discussion**: From Hype to Practice: Navigating the Realities of AI Implementation in Financial Services • What are the key challenges financial institutions face when transitioning from AI hype to practical implementation, and how can they overcome them? • How can banks ensure that AI solutions are aligned with both regulatory requirements and business goals to deliver real value? • What role does data quality and governance play in the successful adoption of AI in financial services, and what steps should organizations take to improve it? • How can financial institutions manage the risks associated with AI, such as biases in algorithms and cybersecurity threats, while still maximizing the technology's potential? *Panelists:* Maddie Daianu, *Head of Data & AI*, **Intuit Credit Karma** Marsal Gavalda, *Chief Technology Officer*, **Clarity AI** *Moderator:* Georgios Samakovitis, *Professor of FinTech*, **Greenwich University**
1:00pm 1:30pm	**USE CASES SHOWCASES: Innovative AI Solutions** Discover groundbreaking AI technologies aiming to transform finance. **Innovation Slot 1: Beyond the Hype: Applying AI to Modernization** Legacy systems and tech debt can slow innovation, making modernization feel like an uphill battle. This session cuts through the noise to show how AI can streamline the process, reducing months of manual effort into days. We'll tackle a common question: *"What does my code even do?"* and explore how AI accelerates version upgrades, testing, and refactoring. Finally, we'll showcase a **live demo** of AI mapping a spaghetti codebase—bringing clarity to complexity. Whether you're facing modernization challenges or just curious about AI's role, this talk offers practical insights for a smarter, faster approach to software evolution. Jacob Shamis, *Vice President Marketing*, **Stride** Michael Wytock, *Principal Software Engineer*, **Stride** **Innovation Slot 2: Accelerating Finance with NVIDIA Blackwell: Supermicro's Next-Gen Infrastructure**

	• Highlighting high-performance, energy-efficient solutions with tailored end-to-end support, ideal for financial services like trading and fraud detection • Blackwell launch - NVIDIA HGX B200 8-GPU System: Showcase the air-cooled NVIDIA HGX B200, delivering scalable, cost-effective AI performance for financial workloads • Demonstrate how Supermicro's systems reduce latency and enhance efficiency in high-frequency trading and fraud detection Michael Spencer, *Director of Field Application Engineering in Solution Enablement*, **Supermicro** **Innovation Slot 3: AI-Powered Document Processing in Banking and Finance** Financial institutions are increasingly implementing AI and machine learning to automate document extraction, classification, and analysis. While traditional OCR (Optical Character Recognition) was a foundational technology, today's solutions far exceed these limited capabilities, moving toward true cognitive automation Mike Chasteen, *SVP of Sales and Customer Success*, **Base64.ai**
1:30pm – 2:20pm	*Lunch & Networking in Exhibition Area*

2:20pm – 2:50pm	Workshop A **Agentic AI in Regulated Industries: Powering the SDLC Without Compromise** Explore how regulated industries can embrace agentic AI across the SDLC—securely and responsibly—and hear practical, actionable examples of outcomes enabled by a single-platform approach tailored to the needs of financial services institutions Maya Ross, *VP, Product Management*, **GitHub**	Workshop B **Transforming Financial M&A with AI Agents: Notable Value Creation Cases** • Traditional structural challenges in M&A processes (due diligence limitations, information asymmetry, decision biases) • Innovation through AI agents: Automated analysis of contracts and financial data, integration of market volatility factors • Concrete examples of value creation: Enhanced decision accuracy, optimized negotiation strategies, reduced timeframes • Practical frameworks for implementation and ROI measurement • Strategies for improving organizational adoption and effective deployment Hiroki Ida, *COO*, **Generative X**

2:50pm-3:20pm	**Keynote Presentation: Building Reliable AI Products in Banking** • How can we ensure that AI models used in banking are fair, unbiased, and ethically sound? • How can we make AI models more transparent and explainable to both internal stakeholders and customers? • What are the best practices for communicating the decision-making process of AI systems? • How can banks navigate the evolving regulatory landscape for AI and machine learning? Miranda Jones, *SVP, Data & AI Strategy Leader* **Emprise Bank**
3:20pm – 3:50pm	**Keynote Presentation: Maturing Generative AI in Asset Management: Multi-Agentic Frameworks and Consolidation with Snowflake** Asset management firms have widely adopted or experimented with Generative AI (GenAI) powered initiatives across the front, middle, and back office. As those GenAI initiatives have matured, the need

for adoption of multi-agentic frameworks has become apparent.

However, deploying GenAI agents in the absence of a commercially driven data strategy leads to complex, fragmented tech stacks, development inefficiencies, and data security concerns. While firms have successfully prototyped sophisticated agents, the need for greater agility and faster time-to-market has driven many to seek consolidation in their technology infrastructures and data strategies as a necessary precondition. In short, even LLM-driven agents can't solve a disorganized technology and data strategy. At Snowflake, we are developing state-of-the-art agentic capabilities and orchestration tools, but only as an extension of the data foundation we have laid across the financial services industry. In this talk, we will explore the first principles of data strategy, from ingestion to governance to AI-readiness, and how they are inextricably linked to a commercially successful multi-agentic AI deployment..

John Heisler, Senior AI/ML Architect leading GenAI implementation for financial services, will demonstrate how Snowflake provides a unified, secure, and governed platform for both technology consolidation and multi-agentic frameworks.

John Heisler, *Senior AI/ML Architect, Applied Field Engineering*, **Snowflake**

3:50pm – 4:20pm	*Afternoon Coffee Break & Networking in Exhibition Area*	
	TRACK A	*TRACK B*
4:20pm – 4:50pm	**Keynote Presentation: From Reactive to Proactive: How AI is Shaping the Fight Against Fraud** In this keynote, we'll explore how AI is transforming fraud prevention in the financial and fintech industries. We'll discuss the evolution of fraud threats, traditional methods, and how AI is enhancing fraud detection. While AI is revolutionizing the field, it also introduces challenges like bias and ethical concerns. By the end of the session, you'll gain insights into how AI is reshaping fraud prevention, its opportunities, and the steps businesses must take to stay ahead of emerging threats. Sumedha Rai, *Data Scientist* **New York University**	**Keynote Presentation: Revolutionizing Payments with AI: Tackling Challenges and Seizing Opportunities** • Overcoming data security, fraud detection, and scalability in AI-powered payment solutions • How AI is driving innovation in real-time payments, personalized customer experiences, and cost optimization • Exploring the role of AI in shaping the next generation of payment systems and industry standards Karamjit Singh, *VP of Artificial Intelligence*, **Mastercard**
4:50pm-5:20pm	**Panel Discussion: Customizing AI for Financial Services – Navigating Unique Challenges and Opportunities** • What are some of the unique challenges financial institutions face when building an AI strategy tailored to their specific needs, and how can they overcome them? • How can organizations effectively integrate AI into their existing legacy systems and business processes without causing major disruptions?	**Panel Discussion: AI and ML for Innovation in Financial Products: Case Studies and Future Directions** • In what specific ways are AI and ML currently reshaping traditional financial products like loans, insurance policies, or investment portfolios? Can you share a practical use case from your experience? • How are financial institutions leveraging AI and ML not just to optimize operations, but to unlock entirely new sources of revenue or business models? • As we look ahead, which emerging AI/ML technologies do you believe will play a

	- When it comes to measuring success, what are the most meaningful KPIs for tracking AI adoption in financial services? - Can you share any real-world examples where customizing AI for financial services has led to a significant competitive advantage or operational improvement? **Panelists:** Tyler Frieling, *Director Emerging Technologies*, **Blackrock** Haonan Wang, *Principal Machine Learning Engineer*, **GoFi** Miranda Jones, *SVP, Data & AI Strategy Leader* **Emprise Bank** **Modreator:** Mark Zabezhinsky, *Director, Product Marketing*, **Alteryx**	central role in the next wave of innovation in financial products? - What lessons have you learned—either through success or failure—when it comes to deploying AI/ML at scale in product development or customer-facing applications? **Panelists:** Akhil Khunger, *VP Quantitative Analytics*, **Barclays** Kristi Kunworee Baishya, *AI Product Lead*, **Nomura Holding America** Frederic Repond, *Vice President, Strategy & Innovation*, **Prudential** **Moderator:** Drew Cukor, *Chief Data & Analytics Officer*, **TWG Global**

5:20pm	**Chairperson Closing Remarks:** Cecilia Dones, Former Adjunct Assistant Professor, **Columbia Business School**
5:20pm-6:00pm	*Networking Reception in the Exhibition Area*
6:00pm	*End of Day 1*

AI in Finance New York| AGENDA
DAY TWO – April 16, 2025
New York

8:15am-9:00am	*Registration & Open Networking in the Exhibition Area*
9:00am-9:10am	**WELCOME NOTE & OPENING REMARKS** Arkin Gupta, *Vice President*, **Morgan Stanley**
9:10am - 9:40am	**Keynote Presentation: Scaling Trustworthy AI to Create Tangible Business Value** - Prepare and manage trusted data to unlock the full potential of AI in business operations. - Focus on the most valuable AI opportunities that deliver measurable results. - Develop skilled teams and robust infrastructures to scale AI across the organization. - Embed fairness, explainability, and ethics into AI systems to maintain trust and accountability Aishwarya Ashok, *Senior Data Scientist* **PURE Insurance**
9:40am 10:10am	**Keynote Presentation: AI Agents Driving Revenue Growth: Case Studies from the Financial Industry** - The evolution of AI agents in finance: From efficiency to revenue generation - Quantitative results from collaborations with leading banks and financial institutions - Enhanced accuracy and time reduction in M&A strategy, financial analysis, and credit assessment - Practical implementation approaches tailored to New York market requirements

	Rei Araki, *CEO*, **Generative X**
10:10am - 10:40am	**Keynote Presentation: The Art of Innovation in the Age of AI** • Unlocking Human Potential in the AI Era • Repositioning Talent to Drive Business Outcomes • Culture as the Foundation of Innovation Touseef Habib, *Vice President-Generative AI Practice* **PNC**
10:40am-10:50am	**USE CASES SHOWCASES: Innovative AI Solutions** Discover groundbreaking AI technologies aiming to transform finance. **Innovation Slot 1: From Customer 180 to 360: Unlocking AI's Full Potential with Trusted Customer Data** • Leverage accurate, enriched, and analyzed data to unlock your AI investments • Verato + Agentic AI ensures identity verification and data validation for exceptional customer experiences • Cohort Analyzer enables organizations to create, analyze, and extract enriched data cohorts for revenue growth JP Lugo, *Senior Solution Architect*, **Verato** Steve Cotton, *RVP of Emerging Markets - Financial Services*, **Verato**
10:50am – 11:20am	*Mid-Morning Coffee Break & Networking in Exhibition Area*
11:20am – 12:00pm	**Panel Discussion: Delivering ROI on AI & ML Initiatives to Secure Long-Term Investment** • How are tech stack decisions changing with AI in finance? • Where are companies seeing the biggest AI infrastructure challenges? • What are the challenges in operationalizing data for AI? • Key steps towards addressing and improving return on investment *Panelists:* Richa Singh, *Director and Head of Data and AI*, **Lexington Partners** Aishwarya Ashok, *Senior Data Scientist*, **PURE Insurance** Dyuti Dave, *Technology Analyst*, **Barclays PLC** Tomasz Noetzel, *Senior Equity Analyst*, **Bloomberg Intelligence** **Moderator:** Kara Marin, *Regional Sales Director, East,* **Glean**
12:00pm-12:30pm	**Keynote Presentation: Revolutionizing Compliance with Applied AI: Enhancing Risk Management and Regulatory Excellence** • Use cases in Anti Money Laundering, Financial Crimes Compliance • User case in managing Regulatory Development Sateesh Kumar C, *Head of Digital Transformation Office* **Societe Generale**
12:30pm-1:30pm	*Lunch & Networking in Exhibition Area*
1:30pm-2:00pm	**Keynote Presentation: AI and Regulation: Partners or Adversaries?** With the rapid rise of Generative AI (GAI), artificial intelligence has taken center stage for both businesses and regulators alike. As regulations proliferate, staying informed about AI legislative and policy developments across various jurisdictions has become critical.

	Ideally, regulating AI should unlock its potential in a clear, risk-informed manner. But do these regulations achieve that goal? Or do they risk stifling innovation and hindering growth instead? Argyro Tasitsiomi, *Head of AI & Investments Data Science* **T. Rowe Price**
2:00pm-2:30pm	**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 AI regulations? • What are the specific benefits of using LLMs for regulatory compliance, particularly in terms of efficiency, accuracy, and insights gained? Dhagash Mehta, *Head of Applied Machine Learning Research* **Black Rock Management**
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 Leonard Hawkes, *Software Engineer*
3:00pm	*Afternoon Coffee Break & Networking in Exhibition Area*
3:30pm-4:00pm	**Keynote Presentation: Open Banking Overview** • **Understanding the Practice:** How third-party financial service providers can access consumer banking transactions and other financial data from banks and non-banks through APIs • **AI-Powered Use Cases:** Exploring real-world use cases of AI in Open Banking • **Challenges in AI Implementation:** Key obstacles and considerations for integrating AI within Open Banking Varun Pandey, *Vice President, Payments Technology* Varun Awasthi, *Vice President* Santosh Kumar Nayak, *Lead Software Engineer*
04:00pm-04:10pm	*Chairperson Closing Remarks*
04:10pm	*End of Conference*