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OCTOBER 21-22, 2026 | HOBOKEN

AI in Finance Summit Fall



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AI in Finance Fall: Driving the Next Wave of Financial Innovation

Following the **exceptional success of our April edition**, we are pleased to announce the return of the summit this autumn. **AI in Finance Fall** will convene the region's preeminent financial innovators and AI visionaries in **New Jersey** to explore the rapidly evolving landscape of intelligent finance.

This summit is specifically designed for leaders who recognize that AI is no longer a peripheral tool, but the core driver of financial transformation. Building on the **momentum of our sold-out spring event**, this second edition offers an expanded platform to share expertise, address complex challenges, and lead the charge in financial technology.

Secure your place at the center of the conversation and ensure your organization is positioned for the next era of innovation.

What's New for AI in Finance Fall 2026

- **Exclusive Strategic Insights:** Gain a competitive edge by exploring the latest advancements in machine learning and generative AI tailored specifically for the financial sector.
- **Actionable Outcomes:** Transition from theory to execution with case studies focused on driving operational efficiency and sustainable growth.
- **High-Level Networking:** Connect with a curated group of industry leaders and pioneers who are actively redefining the future of global markets.

AI in Finance Fall 2026 Key Themes:

- **THE NEXT FRONTIER OF AI IN FINANCE** – From agentic AI and multi-agent systems to quantum breakthroughs reshaping trading, risk, and compliance.
- **TRUST, REGULATION & RESPONSIBLE AI** – Building transparency, fairness, and auditability while navigating evolving global regulatory frameworks.

- **DRIVING BUSINESS VALUE & ROI** – Moving beyond pilots to enterprise-wide adoption, delivering measurable outcomes in efficiency, revenue, and customer experience.
- **AI FOR SUSTAINABLE & INCLUSIVE FINANCE** – Leveraging AI for ESG, climate risk, and expanding financial access in emerging markets.

Speakers Confirmed:

- Biswa Sengupta, *Chief AI Technologist: LLM Suite (CDAO)*, **JPMORGAN CHASE & CO**
- Ellis Wong, *Chief Information Security Officer*, **JST CAPITAL**
- Karun Appapogu, *Head of AI Technologies - CAI*, **VANGUARD**
- Dhagash Mehta, *Head of Applied Machine Learning Research for Investment Management*, **BLACKROCK MANAGEMENT**
- Anant Natekar, *Senior Director, Software Engineering*, **NORTHWESTERN MUTUAL**
- Cristian Homescu, *Director, Portfolio Analytics, Chief Investment Office, Global Wealth and Investment Management (GWIM)*, **BANK OF AMERICA MERRILL LYNCH**
- Krishna Chaitanya Yarlagadda, *Director, Data Science & AI*, **MERCURY FINANCIAL**
- Hari Kishan, *Director, Cloud Engineering*, **MANULIFE**
- Chandni Bhatiam, *Vice President, Lead Quantitative Development*, **J.P. MORGAN**
- Jaydip Mukhopadhyay, *Vice President, Data Science and Model Risk*, **AMERICAN EXPRESS**
- Akhil Khunger, *VP, Quantitative Analytics*, **BARCLAYS**
- Todd Lyon, *VP Engineering Manager*, **TABBANK**
- Sarah Zeis, *Manager, Data Intelligence & Advanced Analytics*, **PORSCHE FINANCIAL SERVICES**
- Andrew McElduff, *Vice President, Membership Application Programs & Risk Monitoring Program Operations*, **FINRA**
- Urie Tucker, *Senior Director, Model Risk Oversight*, **FINRA**
- Hariom Tatsat, *Director, AI Quant*, **BARCLAYS**
- Sujeet Joshi, *Global Head of Operational Risk and AI Transformation*, **BERNSTEIN**
- Lovedeep Saini, *Chief Analytics Officer*, **CONNER STRONG & BUCKELEW**
- Lance Michael Senoyuit, *Financial Services Industry, Executive Advisor*, **SAP AMERICAS REGION**
- Guru Alampalli, *Director*, **METLIFE INVESTMENT MANAGEMENT**
- Dishti Dave, *Site Reliability Engineer - AVP*, **BARCLAYS**
- Yu Yu, *Global Head of AI Client Experience*, **BLACKROCK**
- Manisha Jaiswal, *Executive Director, Wealth Management Technology*, **JPMORGANCHASE**
- Aishwarya Kothapally, *First Vice President | Financial Crimes Compliance*, **BHI**
- Jennifer Ostyn, *Senior Vice President, Revenue*, **KNIME**
- Cecilia Dones, *Adjunct Professor*, **COLUMBIA BUSINESS SCHOOL**
- Robin Braun, *VP AI Business Development, Hybrid Cloud*, **HPE**
- Srinivasa Murthy Achyuthuni, *Vice President | Lead Software Engineer*, **U.S. BANK**
- Ken Rimple, *Senior Developer Relations Advocate*, **HONEYCOMB**
- Snehit Cherian, *CTO*, **LEXISNEXIS NEXIS SOLUTIONS**
- Elumalai Rajendran, *Vice President | Principal Engineer*, **US BANK**
- Albin Joseph, *Associate*, **GOLDMAN SACHS**
- Luke Pendergrass, *Founding Product*, **Xorq Labs**
- Wanyao Zhang, *Product Manager – Credit/Loan*, **SEAMONEY**
- Diego de Aragão, *Former Senior Vice President | Balance Sheet Executive Decision Support, Data Analytics & AI Enablement*, **CITI**
- Ajay Upadhyay, *Director, Software Engineering*, **MASTERCARD**
- Alexandre Pereira, *Founder & CEO*, **2501.ai**
- Andre Nedelcoux, *Global SVP, Financial Services and Insurance*, **INTELLIAS**
- David Dentelski, *Chief Quantum Scientist*, **Qlerate**
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AI in Finance Fall 2026 | AGENDA

DAY ONE – October 21, 2026

New Jersey

8:00am – 8:50am	<i>Registration & Open Networking in the Exhibition Area</i>
8:50am-9:00am	WELCOME NOTE & OPENING REMARKS: Yu Yu, <i>Global Head of AI Client Experience, BLACKROCK</i>
09:00am-9:30am	Keynote Presentation: Beyond Algorithms: Agentic AI and the Quantum Reckoning in Financial Services - Why the quantum threat is a migration deadline, not a broken algorithm — and why "harvest now, decrypt later" makes it a present-day risk. - How agentic AI and quantum are converging on the same cryptographic trust fabric. - The uniquely irreversible exposure facing digital assets, custody, and tokenized real-world assets. - What financial institutions should do now — inventory, crypto-agility, and agent identity — before the hardware arrives Ellis Wong, <i>Chief Information Security Officer, JST CAPITAL</i>
9:30am - 10:00am	Keynote Presentation: The Human Glue in AI: How Soft Skills Drive Impact in Financial Services - Bridging the gap between data teams and business leadership - Enabling scalable AI through cross-functional collaboration - Using emotional intelligence to lead change and foster adoption - Positioning soft skills as a strategic advantage in AI-driven initiatives Lovedeep Saini, <i>Chief Analytics Officer, CONNER STRONG & BUCKELEW</i>
10:00am - 10:30am	Keynote Presentation: Ahead on Ambition, Behind on Production: Closing Financial Services' Agentic AI Gap Most organizations expect to move the majority of their AI experiments into production within months — but only a quarter have actually gotten there. Financial services isn't immune to that gap; if anything, the institutions in this room are investing hardest into closing it. In this keynote, Lance Senoyuit, Sr. Principal, Financial Services Industry, Executive Advisor, SAP America's breaks down why the gap between AI ambition and AI in production persists, where the value quietly leaks out along the way, and what it actually takes to turn deployed AI into AI that changes the business. Key Talking Points: - The gap nobody's closing fast enough — more than half of organizations expect to move most of their AI experiments into production within months. Only a quarter have actually gotten there. That gap is where most institutions are sitting right now. - Where the value actually leaks out — it's rarely the model. Fragmented data, systems that don't talk to each other, and agents bolted onto old workflows instead of built into them quietly cap what "deployed" AI can deliver. - What closing the gap looks like — how leading institutions are turning proprietary data into a strategic asset and building the platform foundation that lets agents operate on real business context, not isolated pilots. Lance Michael Senoyuit, Financial Services Industry, Executive Advisor, SAP AMERICAS REGION
10:30am – 11:00am	<i>Mid-Morning Coffee Break & Networking in Exhibition Area</i>
11:00am - 11:30am	Panel Discussion: Show Me the Money: Finding Real Value in AI Projects - Where is AI actually making money, not just generating headlines? - How much of your AI spend is real ROI versus expensive experimentation?

	- What is the most overhyped AI use case in finance right now? - Why do so many AI pilots look promising but fail to deliver real value at scale? Panelists: Biswa Sengupta, <i>Chief AI Technologist: LLM Suite (CDAO), JPMORGAN CHASE & CO</i> Sarah Zeis, <i>Manager, Data Intelligence & Advanced Analytics, PORSCHE FINANCIAL SERVICES</i> Lovedeep Saini, <i>Chief Analytics Officer, CONNER STRONG & BUCKELEW</i> Robin Braun, <i>VP AI Business Development, Hybrid Cloud, HPE</i> Moderator: Diego de Aragão, <i>Former Senior Vice President Balance Sheet Executive Decision Support, Data Analytics & AI Enablement, CITI</i>
11:30am-11:55am	Keynote Presentation: From Algorithms to Autonomous Finance: A 20-Year Retrospective and the Road Ahead - From models to machines that act; finance is moving from prediction to execution - Autonomy is compounding; what started as automation is becoming decision making - The next edge is not better algorithms; it is systems that think, learn, and act - The future is not AI assisted finance; it is AI driven finance Yu Yu, <i>Global Head of AI Client Experience, BLACKROCK</i>
11:55am - 12:25pm	Panel Discussion: Beyond Generative AI: Defining the Next Wave of Innovation in Finance - Is generative AI already becoming commoditized in finance? - If everyone has copilots, where is the real competitive edge? - What comes after generation; are you ready for AI that actually makes decisions? - Who will lead the next wave; incumbents reinventing themselves or AI native players? Panelists: Dhagash Mehta, <i>Head of Applied Machine Learning Research for Investment Management, BLACKROCK MANAGEMENT</i> Todd Lyon, <i>VP Engineering Manager, TABBANK</i> Albin Joseph, <i>Associate, GOLDMAN SACHS</i> Srinivasa Murthy Achyuthuni, <i>Vice President Lead Software Engineer, U.S. BANK</i> Moderator: Diego de Aragão, <i>Former Senior Vice President Balance Sheet Executive Decision Support, Data Analytics & AI Enablement, CITI</i>
12:25pm-12:35pm	USE CASE SHOWCASE: Customer-Facing AI: Making Agent Outputs Trustworthy Enough to Ship Why agents fail in front of customers. Most customer-facing AI breaks down not because of the model, but because of the data and context behind it: stale inputs, inconsistent definitions, and answers that can't be traced back to a source. Building traceability into every output. How to ground agent responses in governed, versioned data so every answer can be reproduced, audited, and explained, which is critical in regulated financial environments. A practical path from pilot to production. The checks, guardrails, and evaluation practices that give compliance, risk, and business teams the confidence to sign off on putting an agent in front of real customers. Luke Pendergrass, <i>Founding Product, Xorq Labs</i>
12:35pm-1:00pm	Keynote Presentation: Building Financial AI Agents with Memory & Reasoning - Memory turns AI from reactive to strategic - Reasoning is the edge—prediction alone is not enough - Smarter agents make higher-stakes financial decisions

	The real challenge: trusted memory, controlled reasoning Anant Natekar, <i>Senior Director Software Engineering</i>, NORTHWESTERN MUTUAL Dhagash Mehta, <i>Head of Applied Machine Learning Research for Investment Management</i>, BLACKROCK MANAGEMENT	
1:00pm-1:10pm	USE CASE SHOWCASE Agentic AIOps for Secure Financial Infrastructure: Autonomous IT operations under control - Beyond the copilot: what changes when AI agents actually execute incident response, change management, and scheduled maintenance across the hybrid, on-prem, and air-gapped environments that financial institutions run on. - Control in a regulated environment: human-in-the-loop approvals, full audit trails, least-privilege access, and deployments where data never leaves the perimeter, mapped to operational resilience expectations such as DORA and NYDFS Part 500 or FedRAMP. - The economics of autonomous operations: faster resolution, sovereign, less overnight firefighting, and a credible alternative to scaling NOC headcount (in or offshore), with lessons from live enterprise deployments. Alexandre Pereira, <i>Founder & CEO</i>, 2501.ai	
1:10pm – 2:10pm	Lunch & Networking in Exhibition Area	Private Lunch Roundtable – From AI Process Automation to Autonomous AI Agents in Capital Markets: Getting Ready for the Shift - - (Invite Only) Andre Nedelcoux, <i>Global SVP, Financial Services and Insurance</i>, INTELLIAS
	Afternoon Chairperson: <i>Diego de Aragão, Former Senior Vice President Balance Sheet Executive Decision Support, Data Analytics & AI Enablement, CITI</i>	
2:10pm – 2:40pm	AI IN FINANCE UNFILTERED: ASK THE EXPERTS: This will be an interactive discussion, moderated by Snehit Cherian, CTO at LexisNexis Solutions. - Our research says 47% of people in this industry use AI tools their employer has not approved — and 78% of those employers have a policy. So the policy is not the problem. What is? - Is anybody here training a foundation model? And when we say build versus buy — what are we actually still building? - A regulator asks why your system produced a particular answer eighteen months ago. What do you need to show them, and could you show it today? Panelists: Lovedeep Saini, <i>Chief Analytics Officer</i>, CONNER STRONG & BUCKELEW Karun Appapogu, <i>Head of AI Technologies - CAI</i>, VANGUARD Dhagash Mehta, <i>Head of Applied Machine Learning Research for Investment Management</i>, BLACKROCK MANAGEMENT Moderator: Snehit Cherian, <i>CTO</i>, LEXISNEXIS SOLUTIONS	
2:40pm-3:10pm	Keynote Presentation: AI in Finance: A Two-Year Retrospective (2024–2026) - How AI adoption in financial services evolved from experimentation in 2024 to enterprise-wide implementation in 2026 - Key lessons learned from scaling Generative AI initiatives across compliance, risk, operations, and customer experience - What financial institutions must prioritize next to move from AI efficiency gains to long-term competitive advantage	

	Todd Lyon, <i>VP Engineering Manager</i> , TABBANK
03:10pm 03:20pm	USE CASE SHOWCASE: Measuring impact of Agents in Production using Honeycomb • Latency and errors directly impact critical customer flows, and AI Agents are making those flows more complex • Honeycomb lets you measure the impact of changes and problems in production at an aggregate and detail level using application traces and logs • As a result, you know where agents and AI-deployed code improved, degraded, or broke functionality fast, often before your users notice. Ken Rimple, <i>Senior Developer Relations Advocate</i>, HONEYCOMB
3:20pm- 3:30pm	USE CASE SHOWCASE: The Missing Half: Why AI Needs Quantum to Solve Finance Problems • AI struggles with searching combinatorial, highly correlated problems but excels at representing them in a smaller, simpler space. • Quantum processors excel at search but have few noisy qubits and require the problem to be prepared in a specific form. • Together they cover each other's gaps, demonstrated using two finance cases: portfolio optimization and fraud detection. David Dentelski, <i>Chief Quantum Scientist</i>, Qlerate
3:30pm- 4:00pm	<i>Afternoon Coffee Break & Networking in Exhibition Area</i>
4:00pm- 4:30pm	Panel Discussion: Real-Time Risk Intelligence: How Generative AI Is Rewriting Risk Management • Are traditional stress tests already obsolete in a world of real time AI driven risk? • If AI can simulate infinite scenarios, are we finally solving risk or just creating new blind spots? • How much real time risk visibility do institutions actually have versus what they claim? • When AI reacts faster than humans, who is really in control of risk decisions? Panelists: Cristian Homescu, <i>Director, Portfolio Analytics, Chief Investment Office, Global Wealth and Investment Management (GWIM)</i>, BANK OF AMERICA MERRILL LYNCH Andrew McElduff, <i>Vice President, Membership Application Programs & Risk Monitoring Program Operations</i>, FINRA Akhil Khunger, <i>VP, Quantitative Analytics</i>, BARCLAYS Guru Alampalli, <i>Director</i>, METLIFE INVESTMENT MANAGEMENT Moderator: Anant Natekar, <i>Senior Director, Software Engineering</i>, NORTHWESTERN MUTUAL

4:40pm-5:10pm	Panel Discussion: Scaling AI Governance in Finance: How to Leverage Technology Effectively - Is your AI governance truly scaling, or is it already slowing down innovation? - How much of your governance is automated versus still relying on manual oversight? - Are you building governance for today's models or for autonomous systems you cannot fully control yet? - If governance fails at scale, is it a technology gap or a leadership blind spot? Panelists: Urie Tucker, <i>Senior Director, Model Risk Oversight, FINRA</i> Elumalai Rajendran, <i>Vice President Principal Engineer, U.S. BANK</i> Ellis Wong, <i>Chief Information Security Officer, JST CAPITAL</i> Krishna Chaitanya Yarlagadda, <i>Director, Data Science & AI, MERCURY FINANCIAL</i> Moderator: Wanyao Zhang, <i>Product Manager – Credit/Loan, SEAMONEY</i>
5:10pm-6:00pm	Networking Reception in the Exhibition Area
6:00pm	End of Day 1

AI in Finance New York| AGENDA DAY TWO – October 22, 2026 New Jersey

8:30am-9:00am	Registration & Open Networking in the Exhibition Area
08:50:am-9:00am	WELCOME NOTE & OPENING REMARKS: Cecilia Dones, <i>Adjunct Professor, COLUMBIA BUSINESS SCHOOL</i>
9:00am-9:30am	Keynote Presentation: Agentic AI Explainability in Finance - Building trust and transparency in agentic AI decision-making within financial services - Balancing explainability, governance, and regulatory expectations for autonomous AI systems - Practical approaches to making agentic AI outputs understandable and actionable for stakeholders Hariom Tatsat, <i>Director, AI Quant, BARCLAYS</i>
9:30am - 10:00am	Keynote Presentation: Observability and Attribution in large scale multi-agent systems - Scaling AI systems reliably in production - Monitoring and troubleshooting multi-agent systems - Best practices and open challenges for production Manisha Jaiswal, <i>Executive Director, Wealth Management Technology, JPMORGANCHASE</i>
10:00am-10:40am	Panel Discussion: Transforming Financial Institutions with Agentic AI: Lessons from an Analytics Reinvention - What does agentic AI actually look like in production, and how far are you from it? - Where is agentic AI truly outperforming traditional analytics, and where is it still falling short? - What broke first when you tried to deploy agentic systems; your tech, your data, or your culture? - How much autonomy are you really willing to give AI when real money and risk are on the line? - What will it take for you to trust AI to make decisions, not just recommendations?

	Panelists: Jaydip Mukhopadhyay, <i>Vice President, Data Science and Model Risk</i>, AMERICAN EXPRESS Dishti Dave, <i>Site Reliability Engineer - AVP</i>, BARCLAYS Aishwarya Kothapally, <i>First Vice President Financial Crimes Compliance</i>, BHI Jennifer Ostin, <i>Senior Vice President, Revenue</i>, KNIME Moderator: Cecilia Dones, <i>Adjunct Professor</i>, COLUMBIA BUSINESS SCHOOL
10:40 am – 11:10am	<i>Mid-Morning Coffee Break & Networking in Exhibition Area</i>
11:10am – 11:40pm	Keynote Presentation: AI in FP&A: Changing the Work, Building Trust, Protecting Sensitive Information - How AI is changing traditional FP&A: Its impact on budgeting, forecasting, scenario planning, and reporting, and where human judgment remains essential. - Addressing resistance to adoption: Understanding concerns about job security and reliability, and helping finance teams build confidence in using AI. - Protecting sensitive financial information: Setting clear boundaries around using forecasts, workforce plans, and material nonpublic information with AI tools Albin Joseph, <i>Associate</i>, GOLDMAN SACHS
11:40pm-12:10pm	Keynote Presentation: Digital Transformation Simplified Via AI for a Mission-Critical System - How AI can simplify the modernization of complex, mission-critical systems while maintaining reliability and business continuity. - Moving beyond traditional transformation approaches by using AI to accelerate decision-making, automation, and operational efficiency. - Key lessons for implementing AI at scale while managing risk, governance, and integration with existing systems. Ajay Upadhyay, <i>Director, Software Engineering</i>, MASTERCARD
12:10pm-12:40pm	Keynote Presentation: Governing AI Agents in Finance: Tactics, Strategies, and Tools for a New Era - Autonomous agents need guardrails—or they create new risks - Governance must move at the speed of AI - Trust in finance now depends on controlling algorithms - No oversight, no scale: governance is the real enabler Hari Kishan, <i>Director, Cloud Engineering</i>, MANULIFE
12:40pm-1:10pm	Keynote Presentation: Where AI Should Stop: Human in the Loop for SME Lending and Credit Risk How AI turns lending documents into information for credit assessment. Where human judgment is needed to validate evidence and set credit decision boundaries. How teams maintain control through code review, production monitoring, and the development of human expertise Wanyao Zhang, <i>Product Manager – Credit/Loan</i>, SEAMONEY
1:10pm-2:10pm	<i>Lunch & Networking in Exhibition Area</i>
2:10pm	End of the Conference