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APRIL 15-16, 2026 | NEW YORK CITY

AI in **Finance** Summit NY



Convene One Liberty Plaza

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Shape the Future of Finance with AI in New York

Join New York's top financial innovators and AI visionaries, gain exclusive insights, and shape the next era of finance

Connect with industry leaders, innovators, and AI experts at a one-of-a-kind summit where ideas turn into action. Explore cutting-edge applications of AI in finance, discover strategies driving efficiency and growth, and connect with the minds redefining the industry.

This is your chance to be part of the conversation, gain practical insights, and leave inspired to transform your organization with AI. **Don't just follow the revolution, be at the forefront of it.**

WHAT'S NEW FOR 2026?

- **Explore the AI and ML innovations shaping finance**, from autonomous decision-making to real-time risk and fraud management.
- **Connect with New York's top financial and AI leaders** and a global network of executives driving industry transformation.
- **Gain actionable insights from experts and real-world use cases**, enabling your organization to implement AI strategies that accelerate growth and efficiency.
- **Future-proof your business with AI-driven strategies** and stay ahead in a rapidly evolving financial landscape.

AI in Finance New York 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:

- Dhagash Mehta, *Head of Applied Machine Learning Research for Investment Management*, **BLACK ROCK MANAGEMENT**
- Koosha Golmohammadi, *Global Head of AI/ML - Corporate Tech (Compliance and Risk)*, **JPMORGAN CHASE**
- Hariom Tatsat, *Director, AI Quant*, **BARCLAYS**
- Bijit Ghosh, *Managing Director - AI/ML/Data*, **WELLS FARGO**
- Sreekar Bhaviripudi, *Head of Machine Learning*, **MORGAN STANLEY**
- Anant Natekar, *Senior Director Software Engineering*, **NORTHWESTERN MUTUAL**
- Michael Mocanu, *Sr. Director, Data Science & AI*, **LIBERTY MUTUAL INSURANCE**
- Miranda Jones, *SVP, Data & AI Strategy Leader*, **EMPRISE BANK**
- Cecilia Dones, *Adjunct Professor*, **COLUMBIA BUSINESS SCHOOL**
- Alp Basol, *Head of Artificial Intelligence*, **COBANK**
- Schitiz Saxena, *Former Director - Chief Data Office*, **TD**
- Arjun Wadwalkar, *Senior Manager of Product Management*, **GLOBAL PAYMENTS**
- Shone Mousseiri, *Director, AI Model Validation and Governance*, **MANULIFE**
- Brij Mohan, *Vice President-Software Development*, **LPL FINANCIAL**
- Reema Gill, *Data/AI Governance Specialist*, **WEALTHSIMPLE**
- Dhivya Nagasubramanian, *Vice President, AI Transformation & Innovation*, **U.S. BANK**
- Jake Katz, *Head of Analytics Research*, **LONDON STOCK EXCHANGE GROUP**
- Julia Cherashore, *Senior Fellow*, **DATA FOUNDATION**
- Ellis Wong, *Chief Information Security Officer*, **JST CAPITAL**
- Matt Goldwasse, *Head of AI Data Science*, **T. ROWE PRICE**
- Leah Price, *General Manager, Tinman AI Platform*, **BETTER**
- Jaydip Mukhopadhyay, *Vice President, Data Science and Model Risk*, **AMERICAN EXPRESS**
- Sai Zeng, *Head of AI, Executive Director, Investment Banking & Global Capital Markets Technology*, **MORGAN STANLEY**
- Nishit Dhilen Mehta, *Vice President, Data Analytics*, **JPMORGAN CHASE**
- Georgios Samakovitis, *Professor of FinTech*, **UNIVERSITY OF GREENWICH**
- Lily Li, *Head of AI Adoption and Solutions*, **FRANKLIN TEMPLETON**
- Shaurya Tripathi, *Senior Data Scientist*, **MUNICH RE**
- Izge Cengiz Ercan, *Director of Strategic Innovation*, **VALLEY BANK**
- Santosh Gaikwad, *Executive Director - Artificial Intelligence Platform Engineering Lead*, **JPMORGAN CHASE**
- Peter Corless, *Principal Product Marketing Manager*, **REDPANDA**
- Purnima Padmanabhan, *General Manager, Tanzu Division*, **BROADCOM**
- Krishan Sharma, *Senior Vice President Model Risk Management*, **CITI**
- David Micah Katz, *Vice President*, **BLACK ROCK (London)**
- Prashant Reddy, *Co-Founder & CEO*, **ARTIAN AI**
- Hiroki Ida, *Executive Officer*, **GENERATIVEX**
- Koto Ueda, *VP of Finance*, **GENERATIVEX**
- William Platt, *COO*, **ALCHEMY**
- Ricardo Tavares, *Director*, **DELL GLOBAL INDUSTRIES FSI PROGRAM**
- David Coluccio, *Head of Buy Side Segment and Data Feed Strategy*, **S&P GLOBAL MARKET INTELLIGENCE**
- Karun Appapogu, *Head of AI Technologies - CAI*, **VANGUARD**
- Vishal Sharma, *Vice President – Software Engineering*, **BROADRIDGE**
- Kathleen Reilly, *Partner*, **ARNOLD PORTER**
- Aaron Miner, *Partner*, **ARNOLD PORTER**
- John Strand, *Owner*, **BLACK HILLS INFOSEC**
- Michael Cornwell, *Chief Technology Officer*, **Everpure (Formerly Pure Storage)**
- Judson Beaver, *Client Solutions Architect*, **CORETEK**
- Micha Kiener, *CTO*, **FLOWABLE**
- Nick Goble, *Director of Solution Architecture, Financial Services and Insurance*, **DOMINO DATA LA**
- Michael Moore, *Senior Director, Strategy and Innovation*, **Neo4j**
- Dimitri Masin, *CEO and co-founder*, **GRADIENT LABS**
- Conal Doyle, *Senior Presales Engineer*, **KX**
- Colin Strasser, *CEO*, **MONTROSE SOFTWARE**
- Freddy Lecue, *Frontier AI Head / Managing Director*, **WELLS FARGO**
- Yatharth Sejal, *CEO*, **KNOWIDEA**
- Festus Asare Yeboah, *Enterprise Solutions Engineer*, **GALILEO**
- Michael Kolbrener, *Field Chief Technology Officer*, **AHEAD**
- Ritesh Shah, *Chief Architect - AI/ML*, **VANGUARD**

- Edvin Strandberg, *Product Evangelist for the Finance Sector*, WISDOM AI
- Matthew Phoenix, *Americas Head - BFSI*, IMPETUS
- Raman Singh, *Director, Enterprise Strategy*, MASTERCARD
- Hitesh Patel, *Field CTO*, F5
- Lloyd Cope, *Chief Revenue Officer*, SEEKR

AI in Finance New York 2026 | AGENDA

DAY ONE – April 15, 2026

New York

7:30am – 8:30 am	<i>Registration & Open Networking in the Exhibition Area</i>
7:45am-08:30am	<p>SEEKR Breakfast Roundtable (Invite Only) : Are You Ready for Agentic AI?: Agentic AI Readiness in Financial Services</p> <p>Why agent explainability is a different problem than model explainability and what that means for financial institutions operating under SR 11-7 and the EU AI Act's high-risk classification.</p> <p>The operational distinction between a model that predicts and an agent that acts, including how to identify the specific failure modes for your use case and what a non-engineering kill switch looks like in practice.</p> <p>A seven-question readiness self-assessment to take back to your team, designed to surface the organizational gaps (governance, data access, workforce alignment) that block production deployments after the technology works.</p> <p>Venue: The South Boardroom (Mezzanine Level)</p> <p>Moderator: Lloyd Cope, <i>Chief Revenue Officer</i>, SEEKR</p>
8.30am-8:40am	WELCOME NOTE & OPENING REMARKS: Michael Kolbrener, <i>Field Chief Technology Officer</i> , AHEAD
8:40am-9:05am	<p>Keynote Presentation: Open APIs, Closed Vaults: Open Banking Powered by AI—Without Letting Data Leave the Bank</p> <ul style="list-style-type: none"> • Protecting Client Data in the age of AI • A safe AI execution loop • Metadata Driven practical solution <p>Vishal Sharma, <i>Vice President – Software Engineering</i> BROADRIDGE</p>
9:05am - 9:30am	<p>Keynote Presentation: Transforming Compliance: Harnessing LLMs and AI for Proactive Risk Detection and Investigation</p> <ul style="list-style-type: none"> • Enhance risk detection with LLMs that learn from historical investigations and analyst notes. • Empower investigation teams with AI copilots for instant insights, narratives, and recommended actions. • Automate AML/KYC processes using explainable, auditable AI for transparent compliance. • Strengthen defenses by leveraging AI to proactively identify emerging threats and reduce noise <p>Koosha Golmohammadi, <i>Global Head of AI/ML - Corporate Tech (Compliance and Risk)</i> JPMORGAN CHASE</p>
9:30am - 9:55am	<p>Keynote Presentation: Beyond the Black Box: Interpretability of LLMs in Finance</p> <p>Can we open the black box of large language models and make AI in finance truly transparent? As financial institutions adopt LLMs for tasks like trading, compliance, and advisory, the need for</p>

	<p>transparency is more critical than ever. Understanding how these models internally reason about financial topics is key to ensuring trust and regulatory alignment. This talk covers how mechanistic interpretability can reveal internal patterns in LLMs related and use it for applications such as trading, sentiment analysis and hallucination reduction.</p> <p>Hariom Tatsat, <i>Director, AI Quant</i> BARCLAYS</p>
<p>9:55am – 10:25am</p>	<p>Keynote Presentation: Accelerate Ideas to Production: How to Develop, De-risk and Deploy Enterprise AI</p> <p>As a business leader and technology provider Purnima Padmanabhan - General Manager of Broadcom's, Tanzu Division - will share how the Tanzu engineering team's experience of adopting AI coding assistants has informed the way we build software products and optimize Tanzu for agentic use cases that meet enterprise-scale requirements and security standards.</p> <p>In her talk Purnima will outline the success factors necessary to get beyond aspirational ambitions to truly transformative and practical use cases that will make a difference to your business. She'll outline a proven approach to take you from experimentation and guided usage through to establishing an iterative and productive operating model, to delivering features and apps at scale, safely.</p> <p>Topics include:</p> <ul style="list-style-type: none"> • Agentic Runtime Considerations: Establishing guardrails, observability and standardization for autonomous AI agents operating in secure, regulated environments. • Data & AI Sovereignty: Balancing regulatory compliance and local control with the flexibility of an open ecosystem of models, frameworks and data sources. • Robust, Centralized AI Governance: Defining governance for agents such as coding assistants, and enforcing controls on agent access to sensitive enterprise tools and data <p>Purnima Padmanabhan, <i>General Manager, Tanzu Division</i>, BROADCOM</p>
<p>10:25am – 10:50am</p>	<p><i>Mid-Morning Coffee Break & Networking in Exhibition Area</i></p>
<p>10:50am - 11:30am</p>	<p>Panel Discussion: Building and Scaling AI: From Generative AI to AI Agents – Balancing Cost, Risk, and Business Value</p> <ul style="list-style-type: none"> • What are the most effective strategies to scale AI initiatives while keeping costs under control? • How can organizations balance the transformative potential of generative AI with the risks it introduces? • In what ways AI Agents are reshaping business operations, and what challenges come with their adoption? • How do you measure and ensure tangible business value from AI investments across the enterprise? <p>Panelists: Sreekar Bhaviripudi, <i>Head of Machine Learning</i>, MORGAN STANLEY Micha Kiener, <i>CTO</i>, FLOWABLE Alp Basol, <i>Head of Artificial Intelligence</i>, COBANK Sai Zeng, <i>Head of AI, Executive Director, Investment Banking & Global Capital Markets Technology</i>, MORGAN STANLEY</p> <p>Moderator: Judson Beaver, <i>Client Solutions Architect</i>, CORETEK</p>
<p>11:30am- 12:00pm</p>	<p>Keynote Presentation: Building the AI Infrastructure Behind Modern Financial Services</p> <p>Financial institutions are entering a new stage of AI adoption in which model quality and data hygiene alone are insufficient. The main challenge is developing an architecture that can continuously provide data, context, and computation to production AI systems without compromising performance, control, or resilience. Most importantly, it must also meet regulatory requirements.</p>

	<p>This session explores how companies are creating AI environments that combine accelerated computing with high-throughput data platforms to support demanding financial workloads and efficiently coordinate data and GPU resources across teams and use cases. Participants will learn practical ways modern AI infrastructure can help financial firms reduce deployment times, improve resource utilization, and lay the foundation for secure, high-value monetization.</p> <p>Michael Cornwell, <i>Chief Technology Officer</i> Everpure (Formerly Pure Storage)</p>
<p>12:00pm - 12:35pm</p>	<p>Panel Discussion: The Next Power Shift: Agentic AI in Global Finance</p> <ul style="list-style-type: none"> • We have spent years perfecting traditional Machine Learning models, that are world class at predicting risk or generating Alpha. From a business perspective, what is the tangible benefit of moving to an Agentic Workflow? • Finance is built on deterministic rules and traditional Machine Learning models “if X happens, Y must follow”. Yet, multi-agent systems are inherently probabilistic. How do you reconcile a probabilistic brain with a deterministic ledger when managing someone’s life savings? Are we just building more sophisticated black boxes that we can’t truly audit until after they fail? • When agent move at millisecond speeds, the “human in the loop” can feel like an illusion. How do we hard code the human as a supervisor role, so we don’t lose the oversight we had with traditional ML? • In 2010, we had a Flash Crash caused by simple algorithms. Today, we face an ecosystem where millions of autonomous agents may interact in untested ways. Is our rush toward autonomous agents creating a new digital systemic risk where agents might spiral into market wide liquidation? • By the 2027 AI in Finance Summit in New York, what is one financial task currently performed by a human that will be 100% handled by an autonomous multi-agent system? <p>Panelists: Michael Mocanu, <i>Sr. Director, Data Science & AI</i>, LIBERTY MUTUAL INSURANCE Bijit Ghosh, <i>Managing Director - AI/ML/Data</i>, WELLS FARGO Brij Mohan, <i>Vice President-Software Development</i>, LPL FINANCIAL Jake Katz, <i>Head of Analytics Research</i>, LONDON STOCK EXCHANGE GROUP Lily Li, <i>Head of AI Adoption and Solutions</i>, FRANKLIN TEMPLETON</p> <p>Moderator: David Coluccio, <i>Head of Buy Side Segment and Data Feed Strategy</i> S&P GLOBAL MARKET INTELLIGENCE</p>
<p>12:35pm- 1:00pm</p>	<p>Keynote Presentation: Lessons From Deploying Compliant AI Agents Across the Full Lifecycle of Operations in Finance</p> <p>Most AI deployments in financial services never make it past the pilot phase. Dimitri shares six lessons from deploying AI agents that automate the full lifecycle of customer operations at production scale across leading banks and fintechs, covering:</p> <ul style="list-style-type: none"> • Why cost ROI on AI agents is more nuanced than it seems • What it actually takes to go from 50% to 80%+ automation rate • The biggest upside of AI agents in finance right now (it's not cost savings) • How to get to production faster • Why testing is the biggest blind spot in AI agent deployment • The pitfalls of both building and buying, and why neither framing is quite right <p>Dimitri Masin, <i>CEO and co-founder</i>, GRADIENT LABS</p>
<p>1:00pm- 1:10pm</p>	<p>SPOTLIGHT SESSION: A Tale of Champions and Challengers: From Spreadsheets to Artificial Intelligence</p> <ul style="list-style-type: none"> • Evolution of quant analysis on Wall Street — a real-world scenario • Balancing innovation, speed and risk • Delivering business value while avoiding horror stories

	<ul style="list-style-type: none"> • Where people, methods and technology meet <p>Colin Strasser, <i>CEO</i> MONTROSE SOFTWARE</p>	
1:10pm – 1:20pm	<p>USE CASE SHOWCASE: Move Agentic Applications to Production with Auditable Guardrails Why agentic AI gets stuck before production — and what's really slowing financial teams down How to compare experiments and build a compliance-ready evidence trail before you ship A faster, cleaner path to production that brings engineering, risk, and compliance teams to the same page</p> <p>Festus Asare Yeboah, <i>Enterprise Solutions Engineer</i>, GALILEO</p>	
1:20pm – 2:20pm	<p>Lunch & Networking in Exhibition Area</p>	<p>Wisdom AI Lunch: From Data Chaos to Trusted AI: Building Context and Governance for Agentic Analytics (Invite Only)</p> <p>Venue: <i>The South Boardroom (Mezzanine Level)</i></p>
2:20pm – 2:50pm	<p>Keynote Presentation: AI and Customer Data in Finance: Why On-premises Belongs Back in Your AI Strategy</p> <ul style="list-style-type: none"> • Why cloud-only AI strategies in financial services are driving spiralling, unpredictable inference costs and increasing data privacy and sovereignty risk • How to use a hybrid AI approach spanning local, cloud, and on-premises, to run workloads based on cost, sensitivity, and latency, including local-first experimentation on workstation class hardware. • What architectural patterns leading institutions are adopting (hybrid AI data fabric and governed data platforms) to build AI systems that are economically sustainable, compliant, and resilient. <p>As financial institutions race to deploy AI across fraud, risk, trading, and customer experience, many are discovering that cloud-only AI strategies are driving spiraling, and often unpredictable, inference costs and creating new data privacy and sovereignty risks. This keynote reframes the conversation from “cloud vs data center” to ‘cloud and data center’ – a modern hybrid AI approach spanning local, cloud, and on premises—and makes the business case for why on-prem must be a critical consideration for high-volume, sensitive, and latency critical workloads. Attendees will learn how to evaluate deployment choices when running AI workloads, understand the true economics of inference at scale, and see emerging architectural patterns from leading financial institutions, including local-first experimentation with desktop workstations (such as Dell Pro Precision plus NVIDIA DGX Spark with GB10 Grace Blackwell Superchip), a hybrid AI data fabric, and governed data platforms. The session closes with practical guidance on how to rebalance between cloud and on-prem to build AI systems that are economically sustainable, compliant, and resilient.</p> <p>Ricardo Tavares, <i>Director</i> DELL GLOBAL INDUSTRIES FSI PROGRAM</p>	
2:50pm- 3:15pm	<p>Keynote Presentation: AlphaAgents: Large Language Model based Multi-Agents for Equity Portfolio Constructions The field of artificial intelligence (AI) agents is evolving rapidly, driven by the capabilities of Large Language Models (LLMs) to autonomously perform and refine tasks with human-like efficiency and adaptability. In this context, multi-agent collaboration has emerged as a promising approach, enabling multiple AI agents to work together to solve complex challenges. I will talk about our recent work that</p>	

	<p>investigates the application of role-based multi-agent systems to support stock selection in equity research and portfolio management. Furthermore, I will talk about the advantages and limitations of employing multi-agent frameworks in equity analysis, offering critical insights into their practical efficacy and implementation challenges.</p> <p>Dhagash Mehta, Head of Applied Machine Learning Research for Investment Management BLACK ROCK</p>	
<p>3:15pm-3:25pm</p>	<p>USE CASE SHOWCASE: Is Blockchain Really Necessary for Financial AI to Scale?</p> <ul style="list-style-type: none"> • The Infrastructure Gap AI Finance Can't Ignore <ul style="list-style-type: none"> ✓ Financial institutions are already onchain: JPMorgan tokenizing treasuries, Stripe with stablecoin payments, Robinhood moving billions ✓ AI agents need to interact with these systems reliably, at scale, cost-effectively ✓ Just like you couldn't scrape websites fast enough to build Netflix, you can't hit public RPC nodes and build production financial AI • Why AWS Emerged (And Why Cortex Exists) <ul style="list-style-type: none"> ✓ HTTP existed, but building scalable applications was impossible without infrastructure abstraction ✓ Blockchain protocols exist, but building AI agents that interact with onchain finance is operationally infeasible without the right data layer ✓ Cortex solved for financial AI what AWS solved for cloud apps: reliability (99.9% uptime vs. node failures), speed (80% faster than competitors), cost (90% reduction), and abstractions AI agents actually need <p>William Platt, COO ALCHEMY</p>	
<p>3:25pm-3:55pm</p>	<p><i>Afternoon Coffee Break & Networking in Exhibition Area</i></p>	
	<p>TRACK A</p>	<p>TRACK B</p>
<p>3:55pm – 4:20pm</p>	<p style="text-align: center;">Discussion Group</p> <p>Converging Real-Time Data with AI for Financial Services</p> <ul style="list-style-type: none"> • How can we use real-time data streams to make better LLMs? (ex: fine tuning) • How can we use real-time data for better AI inferencing? (ex: observability & evaluation) • How can we use real-time data for agentic systems (RAG and MCP architectures)? Documented here <p>Moderator: Peter Corless, <i>Principal Product Marketing Manager, REDPANDA</i></p>	<p style="text-align: center;">Workshop</p> <p>Hands-on Workshop: Embedding AI Agents into Everyday Finance Workflows</p> <p>Live demonstrations to explore how AI agents can be embedded into document/spreadsheet workflows in finance where intelligence becomes part of daily work (e.g., FP&A, reporting, modelling). Experience real-time interactions with AI agents across documents, data, and presentations, showing how a single agentic approach can be applied consistently across recurring, common themes</p> <p>Build and customize simple AI agents during the session, giving participants first-hand experience of rapid agent development with practical guardrails, triggers, and approvals - without conventional engineering efforts.</p> <p>Hiroki Ida, <i>Executive Officer, GENERATIVEX</i></p>
<p>4:20pm-4:45pm</p>	<p>Presentation: From Pioneers to Practice: Lessons Learned from Early Adopters of AI in Finance</p> <ul style="list-style-type: none"> • Failures First – What early missteps revealed about AI's real limits in finance. 	<p>Presentation: Building Resilient AI in Financial Services</p>

	<ul style="list-style-type: none"> Scaling Wins – How pioneers turned pilots into enterprise-wide impact. Trust Factor – Building governance and transparency from the start. Next Moves – What early adopters see as the boldest opportunities ahead <p>Alp Basol, <i>Head of Artificial Intelligence</i> COBANK</p>	<ul style="list-style-type: none"> Thriving in uncertainty, AI built to perform under market volatility and rapid change. Trust by design, resilience rooted in transparency, governance, and ethical AI. Future-ready finance, adaptable AI that meets new risks, regulations, and customer demands <p>Shone Mousseiri, <i>Director, AI Model Validation and Governance</i> MANULIFE</p>
4:45pm-5:20pm	<p>Panel Discussion: Building Trust in AI - Why Data Quality & Governance Matter Most in Finance</p> <ul style="list-style-type: none"> How does poor data quality directly undermine AI outcomes in finance? What governance practices truly build trust in AI-driven decisions? How can institutions balance innovation with strict data controls? What lessons from early adopters show the ROI of strong data governance? <p>Panelists: Schitz Saxena, <i>Former Director - Chief Data Office, TD</i> Julia Cherashore, <i>Senior Fellow, DATA FOUNDATION</i> Nishit Dhilen Mehta, <i>Vice President, Data Analytics, JPMORGAN CHASE</i> Dhagash Mehta, <i>Head of Applied Machine Learning Research for Investment Management, BLACK ROCK MANAGEMENT</i></p> <p>Moderator: Michael Moore, <i>Senior Director, Strategy and Innovation, Neo4j</i></p>	<p>Panel Discussion: The 2030 Revolution: A Deep Dive into AI's Impact on the Finance Sector</p> <ul style="list-style-type: none"> By 2030, what will distinguish financial institutions that successfully harness AI from those that fall behind? Which areas of the financial sector are most ripe for AI-driven transformation in the next five years? How do we scale AI in finance while ensuring trust and control? How will AI reshape the roles, skills, and culture of professionals in the finance industry by 2030? <p>Panelists: Arjun Wadwalkar, <i>Senior Manager of Product Management, GLOBAL PAYMENTS</i> Jake Katz, <i>Head of Analytics Research, LONDON STOCK EXCHANGE GROUP</i> Matt Goldwasser, <i>Head of AI Data Science, T. ROWE PRICE</i> Aakanksha Jadhav, <i>Director Product Development, MASTERCARD</i></p> <p>Moderator: Matthew Phoenix, <i>Americas Head - BFSI, IMPETUS</i></p>
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, 2026 New York

8:00am-8:30am	Registration & Open Networking in the Exhibition Area
8:30am-8:40am	WELCOME NOTE & OPENING REMARKS: Michael Kolbrener, <i>Field Chief Technology Officer, AHEAD</i>

<p>8:40am-9:05am</p>	<p>Keynote Presentation: AI Hub: Delivering Agents at Start up Speed and Enterprise Scale</p> <ul style="list-style-type: none"> • Scaling AI with Control: Build an Enterprise AI Hub that enables rapid experimentation without compromising governance, security, or production readiness. • From Experimentation to Production: Leverage self-service platforms, reusable blueprints (RAG, agents, multi-agent systems), and a Run → Experiment → Promote model. • Enterprise-Ready AI at Scale: Embed observability, cost control, and Responsible AI to accelerate adoption and deliver real business value. <p>Karun Appapogu, <i>Head of AI Technologies – CAI</i> Ritesh Shah, <i>Chief Architect - AI/ML</i></p> <p>VANGUARD</p>
<p>9:05am - 9:30am</p>	<p>Keynote Presentation: Scaling Generative and Agentic AI Validation for High-Stakes Financial Systems</p> <p>Challenge: As Generative and Agentic AI systems are increasingly used in high-impact environments, validating their behaviour in a scalable and trustworthy way remains a major challenge.</p> <p>Approach: We present an adaptive, panel-based validation framework that dynamically selects and combines multiple evaluators based on context and reliability.</p> <p>Outcome: This approach enables more robust, scalable, and context-aware validation, improving confidence in AI systems deployed in critical settings.</p> <p>Freddy Lecue, <i>Frontier AI Head / Managing Director, WELLS FARGO</i></p>
<p>9:30am-10:05am</p>	<p>Panel Discussion: Delivering AI Tools for Finance: Secure, Compliant, and Enterprise-Ready</p> <ul style="list-style-type: none"> • How can financial institutions strike the right balance between rapid AI innovation and strict compliance requirements? • What are the most common security risks when deploying AI in finance, and how can organizations mitigate them? • How can firms ensure that AI tools are not only compliant at launch but remain compliant as regulations evolve? • What does it take to scale AI solutions across an enterprise without compromising governance or customer trust? • Looking ahead, what capabilities will define the next generation of AI tools that are truly enterprise-ready for finance <p>Panelists: Dhivya Nagasubramanian, Vice President, AI Transformation & Innovation, U.S. BANK Leah Price, General Manager, Tinman AI Platform, BETTER Ellis Wong, Chief Information Security Officer, JST CAPITAL Izge Cengiz Ercan, Director of Strategic Innovation, VALLEY BANK</p> <p>Moderator: Nick Goble, <i>Director of Solution Architecture, Financial Services and Insurance, DOMINO DATA LAB</i></p>
<p>10:05am - 10:35am</p>	<p>Keynote Presentation: From AI Agents to Invisible Intelligence: The Next Operating Model for Financial Services</p> <p>Assess the shift from discrete AI agents to embedded, ambient intelligence within core finance and customer-facing systems, and present implications for scale, governance, and user adoption</p> <p>Understand why human-in-the-loop design and event-driven triggers are critical for actionable, auditable, and trusted AI in regulated environments.</p> <p>Highlight how new development paradigms enable business teams to design and deploy internal AI agents faster, unlocking speedy domain-led innovation while staying aligned with risk and compliance requirements.</p> <p>Koto Ueda, VP of Finance</p>

	GENERATIVEX
10:35am-10:55am	<p>Keynote Presentation: AI Adoption Under Scrutiny: Legal & Compliance Risks for Financial Institutions</p> <ul style="list-style-type: none"> Financial institutions are rapidly integrating AI into core business functions – from underwriting and customer engagement to compliance and internal decision-making. But the experimentation phase is over. As AI becomes embedded in daily operations, regulators and litigants are evaluating its use through existing disclosure, supervisory, and enforcement frameworks. The question is no longer whether institutions are using AI – it is whether they can demonstrate governance, defensibility, and compliance when challenged. In this session, Kate Reilly and Aaron Miner, securities partners at international AmLaw 100 firm Arnold & Porter will offer a legal and enforcement-focused perspective on AI risk management in the financial sector. They will address preservation and discoverability of AI prompts and outputs, privilege risks highlighted in emerging decisions (including recent scrutiny of whether AI prompts may be protected), accountability for AI-generated errors, and exposure created by employee use of external or personal AI tools, and third party/vendor AI risk and data privacy or training data governance concerns. The discussion will also cover disclosure obligations, supervisory expectations, and “Training 2.0” – practical governance measures institutions should implement now to reduce litigation and enforcement risk as AI adoption accelerates. <p>Kathleen Reilly, <i>Partner</i>, ARNOLD PORTER Aaron Miner, <i>Partner</i>, ARNOLD PORTER</p>
10:55am – 11:25am	<i>Mid-Morning Coffee Break & Networking in Exhibition Area</i>
11:25am – 12:00pm	<p>Panel Discussion: Trusted Customer Data as the Catalyst for AI Innovation</p> <ul style="list-style-type: none"> How can financial institutions ensure the quality, integrity, and governance of customer data to drive reliable AI outcomes? In what ways does trusted customer data accelerate the development of innovative, personalized financial products and services? What are the biggest challenges in balancing customer privacy with the need for data to fuel AI innovation? How can organizations build and maintain customer trust while scaling AI solutions that rely heavily on sensitive data? <p>Panelists: Reema Gill, <i>Data/AI Governance Specialist</i>, WEALTHSIMPLE Shaurya Tripathi, <i>Senior Data Scientist</i>, MUNICH RE Prashant Reddy, <i>Co-Founder & CEO</i>, ARTIAN AI Santosh Gaikwad, <i>Executive Director - Artificial Intelligence Platform Engineering Lead</i>, JPMORGAN CHASE</p> <p>Moderator: Yatharth Sejpai, <i>CEO</i>, KNOWIDEA</p>
12:00pm-12:25pm	<p>Keynote Presentation: Next-Gen AI Agents in Finance: Driving Revenue Beyond Efficiency</p> <ul style="list-style-type: none"> Beyond automation: how AI agents move from task execution to strategic decision-making. Efficiency unlocked: streamlining operations and reducing costs across the financial ecosystem. Revenue engine: transforming AI agents into drivers of growth, new products, and customer value. The future of finance: AI agents reshaping roles, talent, and business models. <p>Anant Natekar, <i>Senior Director Software Engineering</i> NORTHWESTERN MUTUAL</p>
12:25pm-12:50pm	Keynote Presentation: How to Hack a Bank in Three Easy Steps

	<ul style="list-style-type: none"> • How attackers gain access with cutting edge attacks like simply asking for money to be transferred • How cloud and AI fits into attack and defence • How you can better defend you and your company from these attacks <p>John Strand, Owner BLACK HILLS INFOSEC</p>	
12:50pm-1:00pm	<p>SPOTLIGHT SESSION: Architecting the AI-Enabled Enterprise</p> <p>Share insights from industry leaders on the challenges, strategies, and real-world solutions for moving AI initiatives from experimentation to full production.</p> <p>Introduce a practical framework for scaling AI success while ensuring security, governance, and long-term sustainability.</p> <p>Highlight specific technologies and solutions that accelerate the path from prototype to production-ready deployment.</p> <p>Hitesh Patel, <i>Field CTO, F5</i></p>	
1:00pm-1:50pm	<i>Lunch & Networking in Exhibition Area</i>	
	<i>Track A</i>	<i>Track B</i>
1:50pm-2:15pm	<p>Presentation: AI Won't Save Your Firm. Your People Will</p> <p>Eighty-five percent of leaders say adapting their workforce to AI is critical. Seven percent are doing it. David Katz led the deployment of frontier AI across BlackRock's active investment business and beyond - starting not with the easiest users, but the most demanding. He shares a counterintuitive measurement approach that revealed where real value lives, the adoption engine that scaled it from hundreds to thousands, and why he thinks that firms that invest in their people will outperform those that replace them</p> <p>David Micah Katz, Vice President, BLACK ROCK (London)</p>	<p>Presentation: AI Explainability in Finance: Building Responsible, Transparent, and Trusted Systems</p> <p>This session puts people at the center of AI explainability. Using real banking examples, it offers a practical framework to identify high-value AI use cases and design explanations that are clear, responsible, and trusted across the organization.</p> <p>Miranda Jones, <i>SVP, Data & AI Strategy Leader</i> EMPRISE BANK</p>
2:15pm-2:40pm	<p>Presentation: In Agents We Trust: transparent infrastructure for Agentic Finance & the limits of AI Ethics</p> <ul style="list-style-type: none"> • Trust, transparency, and explainability as the foundation for AI adoption in financial services. • How evolving regulations are shaping responsible AI design and governance. • Turning ethical AI principles into practical, scalable implementation. • Balancing innovation with risk management and long-term compliance. <p>Georgios Samakovitis, <i>Professor of FinTech, University of Greenwich</i></p>	<p>Presentation: Building AI Capabilities Successfully, from the Ground Up</p> <ul style="list-style-type: none"> • How capital markets are being redefined in 2026 and the challenges that is bringing • Roadblocks to building production grade AI solutions • Introducing the concept of Temporal AI • The implementation framework for AI ready infrastructure • Use cases our clients are exploring <p>Conal Doyle, <i>Senior Presales Engineer</i> KX</p>

2:40pm- 3:05pm	<p>Keynote Presentation: Tailoring AI for the Financial Sector: Understanding the Unique Challenges and Opportunities</p> <ul style="list-style-type: none"> • Building a financial sector-specific AI strategy • Integrating AI with existing business processes and systems • Establishing key performance indicators (KPIs) for AI adoption <p>Krishan Sharma, Senior Vice President Model Risk Management CITI</p>
3:05pm- 3:15pm	Closing Remarks
3:15pm	End of the Conference