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
- Stephanie Zhang, *Managing Director, Enterprise AI & Data Products*, JPMORGAN CHASE
- Namrata Shah, *Managing Director, AI Adoption, Finance Transformation*, NUVEEN
- Pravin Kumar, *Intelligent Automation Leader, RPA & AI*, FIRST HORIZON
- Koosha Golmohammadi, Global Head of AI/ML - Corporate Tech (Compliance and Risk), JPMORGAN CHASE
- Hariom Tatsat, *Vice President in Quantitative AI Team*, BARCLAYS
- Bijit Ghosh, *Managing Director - AI/ML/Data*, WELLS FARGO
- Julia Cherashore, *Deputy Superintendent, Data Governance and Management*, NEW YORK STATE DEPARTMENT OF FINANCIAL SERVICES
- Tim Yangm, *Director, AI/ML Transformation*, UNUM
- Anupama Garani, *AI & Machine Learning*, PIMCO
- Sreekar Bhaviripudi, *Head of Machine Learning*, MORGAN STANLEY
- Raj Gunukula, *Group Technical Program Manager*, COINBASE
- Arijit Ghosh, *Senior AI Engineer*, AMERICAN EXPRESS
- Argyro Tasitsiomi, *Head of AI & Investments Data Science*, T. ROWE PRICE
- 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, *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

<table>
<tr><th colspan="2">AI in Finance New York 2026 | AGENDA
DAY ONE – April 15, 2026
New York</th></tr>
<tr><td>8:00am – 9:00 am</td><td>Registration & Open Networking in the Exhibition Area</td></tr>
<tr><td>09.00am-9:10am</td><td>WELCOME NOTE & OPENING REMARKS: Cecilia Dones, Adjunct Professor, COLUMBIA BUSINESS SCHOOL</td></tr>
<tr><td>9:10am - 9:40am</td><td>Keynote Presentation: Transforming Compliance: Harnessing LLMs and AI for Proactive Risk Detection and Investigation
• 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

Koosha Golmohammadi, Global Head of AI/ML - Corporate Tech (Compliance and Risk)
JPMORGAN CHASE</td></tr>
<tr><td>9:40am - 10:10am</td><td>Keynote Presentation: Beyond the Black Box: Interpretability of LLMs in Finance
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</td></tr>
</table>

	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. Hariom Tatsat, *Vice President in Quantitative AI Team* BARCLAYS	
10:10am – 10:40am	Keynote Presentation: Tailoring AI for the Financial Sector: Understanding the Unique Challenges and Opportunities • Building a financial sector-specific AI strategy • Integrating AI with existing business processes and systems • Establishing key performance indicators (KPIs) for AI adoption	
10:40am – 11:10am	*Mid-Morning Coffee Break & Networking in Exhibition Area*	
11:10am - 11:50am	Panel Discussion: Building and Scaling AI: From Generative AI to AI Agents – Balancing Cost, Risk, and Business Value • 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? Panelists: Sreekar Bhaviripudi, *Head of Machine Learning*, MORGAN STANLEY Namrata Shah, *Managing Director, AI Adoption, Finance Transformation*, NUVEEN Raj Gunukula, *Group Technical Program Manager*, COINBASE Alp Basol, *Head of Artificial Intelligence*, COBANK	
11:50am-12:20pm	Keynote Presentation: The Future of Payments: AI-Powered, Instant & Borderless • Using AI for secure, real-time global transactions • Overcoming fraud and data challenges in AI-powered payments • The role of AI in CBDCs and next-gen payment rails	
12:20pm - 01:00pm	Panel Discussion: The Next Power Shift: Agentic AI in Global Finance • How multi-agent systems are driving real-time decision-making in trading, risk, and compliance • The role of AI orchestration in creating autonomous financial ecosystems • Balancing innovation with human oversight and regulatory trust Panelists: Michael Mocanu, *Sr. Director, Data Science & AI*, LIBERTY MUTUAL INSURANCE Bijit Ghosh, *Managing Director - AI/ML/Data*, WELLS FARGO Brij Mohan, *Vice President-Software Development*, LPL FINANCIAL	
1:00pm 1:10pm	USE CASE SHOWCASE: Innovative AI Solutions Discover groundbreaking AI technologies aiming to transform finance. Innovation Slot 1:	
1:10pm – 2:10pm	*Lunch & Networking in Exhibition Area*	
2:10pm – 2:40pm	Workshop A	Workshop B The Human Glue in AI: How Soft Skills Drive Impact in Financial Services

	The AI Scale-Up Challenge in Financial Services: From Pilot to Production with Confidence • Beyond Pilots: From experiments to enterprise-wide adoption. • Scaling with Trust: Governance, compliance & risk built in. • Measurable Impact: Revenue, efficiency & customer value. • Future-Proofing Finance: AI ready for shifting regs & markets.	• 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
2:40pm-3:10pm	Keynote Presentation: Beyond Limits, How Quantum AI Will Transform Financial Services • Early signals of quantum computing integration with AI for portfolio optimization and fraud detection • Potential breakthroughs and realistic adoption timelines for finance • Managing hype vs. reality: what leaders should invest in today Argyro Tasitsiomi, *Head of AI & Investments Data Science*, T. ROWE PRICE	
03:10pm-03:20pm	USE CASE SHOWCASE: Innovative AI Solutions Discover groundbreaking AI technologies aiming to transform finance. Innovation Slot	
3:20pm – 3:50pm	Keynote Presentation: The Next Frontier of AI in Finance: From Agentic Intelligence and Multi-Agent Systems to Quantum Breakthroughs Transforming Trading, Risk & Compliance • Agentic AI driving smarter trading decisions. • Multi-agent systems for better forecasting and risk. • Quantum computing reshaping compliance. • Strategic impact for financial institutions. Dhagash Mehta, Head of Applied Machine Learning Research for Investment Management BLACK ROCK	
3:50pm – 4:20pm	*Afternoon Coffee Break & Networking in Exhibition Area*	
	Technical Track	*Business User Track*
4:20pm – 4:50pm	Keynote Presentation: Building Resilient AI in Financial Services • 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 Shone Mousseiri, Director, *AI Model Validation and Governance* MANULIFE	Keynote Presentation: From Pioneers to Practice: Lessons Learned from Early Adopters of AI in Finance • Failures First – What early missteps revealed about AI's real limits in finance. • 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 Alp Basol, *Head of Artificial Intelligence* COBANK
4:50pm-5:20pm	Panel Discussion: Building Trust in AI - Why Data Quality & Governance Matter Most in Finance	Panel Discussion: The 2030 Revolution: A Deep Dive into AI's Impact on the Finance Sector

	• 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? Panelists: Julia Cherashore, *Deputy Superintendent, Data Governance and Management*, NEW YORK STATE DEPARTMENT OF FINANCIAL SERVICES Anupama Garani, *AI & Machine Learning*, PIMCO Schitiz Saxena, *Director - Chief Data Office*, TD	• 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 can we balance automation with transparency, fairness, and human oversight as AI becomes central to financial decision-making? • How will AI reshape the roles, skills, and culture of professionals in the finance industry by 2030?
5:20pm	Chairperson Closing Remarks:	
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	
8:15am-9:00am	*Registration & Open Networking in the Exhibition Area*
9:00am-9:10am	WELCOME NOTE & OPENING REMARKS
9:10am - 9:40am	Keynote Presentation: The AI Maturity Journey in Financial Services: Driving Growth, Innovation & Trust • From Pilots to Scalable Impact: How financial institutions can evolve AI maturity to unlock measurable business outcomes. • The Growth Catalyst: Why AI maturity is the key to driving efficiency, innovation, and revenue generation in financial services. • Building Trust at Scale: How to align governance, compliance, and customer trust as AI capabilities mature. Pravin Kumar, *Intelligent Automation Leader, RPA & AI* FIRST HORIZON
9:40am 10:20am	Panel Discussion: Delivering AI Tools for Finance: Secure, Compliant, and Enterprise-Ready • 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
10:20am - 10:50am	Keynote Presentation: The Human Side of AI in Finance: Talent, Culture & Governance • Empowering people, not replacing them: building AI teams that thrive in regulated financial environments. • Trust at every step: embedding human-in-the-loop strategies to ensure responsible governance. • Culture as the catalyst: driving organization-wide adoption of AI through mindset and leadership transformation.
10:50am- 11:00am	USE CASES SHOWCASES: Innovative AI Solutions Discover groundbreaking AI technologies aiming to transform finance. Innovation Slot :
11:00am – 11:30am	*Mid-Morning Coffee Break & Networking in Exhibition Area*
11:30am – 12:10pm	Panel Discussion: Trusted Customer Data as the Catalyst for AI Innovation • 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?
12:10pm- 12:40pm	Keynote Presentation: Next-Gen AI Agents in Finance: Driving Revenue Beyond Efficiency • 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. Anant Natekar, *Senior Director Software Engineering* NORTHWESTERN MUTUAL
12:40pm- 1:40pm	*Lunch & Networking in Exhibition Area*
1:40pm- 2:10pm	Keynote Presentation: Evaluating & Benchmarking LLMs in Finance: How to Compare Models for Real-World Impact • Domain Accuracy: Assess how LLMs perform on finance-specific reasoning tasks • Safety & Compliance: Measure domain-specific safety, ethics, and regulatory alignment • Cost vs Capability Trade-offs: Compare performance, inference cost, latency, and scalability in live financial use • Agentic & Tool-Enabled Behavior: Go beyond single-response metrics: evaluate reasoning chains, tool use, memory, and multi-step workflows
2:10pm- 2:40pm	Keynote Presentation: AI Explainability in Finance: Building Responsible, Transparent, and Trusted Systems

	- Clarity in Complexity: Why explainability is essential for financial institutions adopting AI at scale. - Trust & Compliance: Meeting regulatory requirements and strengthening customer confidence through transparent AI. - From Black Box to Glass Box: Practical approaches to make AI decisions understandable and auditable in finance. - Responsible Innovation: Balancing advanced AI capabilities with accountability, fairness, and ethical considerations Miranda Jones, *SVP, Data & AI Strategy Leader* EMPRISE BANK
2:40pm- 3:10pm	Keynote Presentation: Fighting Financial Fraud with Analytics & AI: Smarter Detection, Stronger Protection - From Reactive to Proactive: AI-powered analytics to predict and prevent fraud before it happens. - Real-Time Defense: Stopping fraudulent transactions instantly while protecting customer experience. - Agile & Adaptive Models: Continuously evolving with new fraud schemes and financial crime tactics. - Trust as Currency: Strengthening compliance, transparency, and customer confidence through responsible AI.
03:10pm- 03:20pm	*Chairperson Closing Remarks*
03:20pm	*End of Conference*