

Three Specialized Summits Defining the Next Financial Era: where AI moves beyond pilot mode to command the core engines of global finance.

Following the momentum of our 2026 edition, three executive-level summits return to New York in April 2027, bringing together the financial institutions, technology leaders and AI pioneers building what comes next.

Across two days, explore the technologies, strategies and infrastructure moving financial AI from experimentation to production and from automation to autonomous decision-making.

AI in Finance Summit NY

Where AI becomes business value. Explore how financial institutions are moving beyond AI pilots to transform financial products, investment processes, decision-making and customer experiences—while turning AI investment into measurable business impact.

AI in Risk Management for Finance Summit NY

Where AI innovation meets control. Examine how financial institutions are rethinking model risk, governance, security and digital trust as AI systems become more autonomous and increasingly embedded in critical financial decisions.

AI Foundations & Enterprise Architecture for Financial Services Summit NY

Where the infrastructure for enterprise AI is built. Go beneath the AI hype to explore the data, infrastructure, reasoning and orchestration layers required to deploy reliable AI across the financial enterprise.

Speakers Confirmed:

- Koosha Golmohammadi, Global Head of AI/ML – Corporate Tech (Compliance and Risk), JPMORGAN CHASE & CO.
- Stephanie Epstein, *Global Head of Multi-Manager Platform and Models Infrastructure*, BLACKROCK
- Rhea R, *Head of AI & Emerging Banking Solutions Risk*, M&T Bank
- Rania Svoronou, *Global Head of AI Design*, CITI
- Ted Paris, *Head of AI2 US*, TD Bank
- Sateesh Kumar C, Head of Digital Transformation Office, SOCIETE GENERALE
- Matt Goldwasser, Head of AI Data Science, T. ROWE PRICE
- Akash Nikam, Head of AI Product & Engineering, VANGUARD

- Jacob Georgeson, Head of Artificial Intelligence, ATLANTICUS
- Kuntal Dutta, Senior Director, Global Head of People Analytics & Workforce Management, BNY
- Silvana Miller, VP, Data and AI Strategy, MASTERCARD
- Dhivya Nagasubramanian, Vice President, AI Transformation & Innovation, U.S. BANK
- Brij Mohan, *Vice President | Principal Software Dev.*, LPL FINANCIAL
- Girish Gajwani, Vice President of Engineering – Securitized Products, BARCLAYS INVESTMENT BANK
- David Micah Katz, Vice President, BLACKROCK (LONDON)
- Todd Lyon, VP Engineering Manager, TAB BANK
- Aditya Krishnan, VP of AI Engineering, MCbankNY
- Hariom Tatsat, *Director, AI Quant*, BARCLAYS
- Paul-Adrien M, Director, Head of AI, CANTOR FITZGERALD ASSET MANAGEMENT
- Naresh Gunupuru, Executive Director, JPMORGAN CHASE
- Tyler Frieling, Director, Emerging Technologies, BLACKROCK
- Harry Mendell, Data Architect, Technology Group, FEDERAL RESERVE BANK OF NEW YORK
- Reema Gill, Data/AI Governance – GRC Security, WEALTHSIMPLE
- Georgios Samakovitis, *Professor of FinTech*, UNIVERSITY OF GREENWICH
- Srinivasa Murthy Achyuthuni, *Vice President | Lead Software Engineer*, U.S. Bank
- Elumalai Rajendran, *Vice President & Principal Engineer, Authentication & Identity Security*, U.S. Bank
- Koto Ueda, *Head of US Operations / VP of Finance*, GENERATIVEX

Ai in Finance Summit NY AI in Risk Management for Finance Summit NY April 12, 2027	
	AI in Finance & AI in Risk Management for Finance
07:30am	*Registration & Coffee in the Exhibition Area*
Combined AI in Finance & AI in Risk Management for Finance Main Stage	
08:30 am	*Chairperson's Opening Remarks & Icebreaker - –*
08:40am- 09:10am	Opening Keynote Presentation: Beyond RAG: Building the Reasoning Layer for AI in Finance • Moving beyond retrieval to evidence-based reasoning and financial decision-making. • Connecting enterprise data, semantics, metrics, and analytics through a unified reasoning architecture. • Ensuring AI-driven financial insights are accurate, explainable, and auditable Harry Mendell, *Data Architect Technology Group*, FEDERAL RESERVE BANK OF NEW YORK
09:10am- 09:40am	Keynote Presentation: From Data to Strategy: Transforming Investment Processes with a Self-Correcting Multi-Agent Framework • Traditional LLMs Are Not Production-Ready for Regulated Investment Workflows • Harbor's Multi-Agent AVR Framework Delivers Institutional-Grade Reliability • Validation-Centric AI Is Essential for Scalable Adoption Matt Goldwasser, *Head of AI Data Science* T. ROWE PRICE

9:40am-10:10am	**Keynote Presentation: Quantum Meets AI: Building Hybrid Computing Workflows for Finance** • Identifying financial workloads suited to a combination of AI, classical computing, and quantum methods. • Designing hybrid workflows that coordinate data preparation, quantum processing, and AI-driven analysis. • Benchmarking accuracy, execution time, and cost against classical alternatives to assess practical value.	
10:10am-10:40am	**Main Stage Panel Discussion: Protecting Financial Data While Making AI Useful** • How can financial institutions balance data protection with AI innovation? • What are the biggest security risks when AI accesses sensitive financial data? • How can organizations prevent data leakage in AI-powered systems and agents? • What controls are essential for secure AI deployment at scale? • How can institutions ensure regulatory compliance without limiting AI capabilities? **Panelists:** Srinivasa Murthy Achyuthuni, *Vice President | Lead Software Engineer*, **U.S. Bank**	
10:40am-11:10am	*Networking Break*	
11:10am-11:40am	***USE CASE SHOWCASE: Innovative AI Solutions*** *Explore real-world AI use cases, practical applications, and innovative solutions transforming financial services.* • ***Use Case 1*** • ***Use Case 2*** • ***Use Case 3***	***Closed-Door Discussion Group: Architecting AI-Ready Infrastructure for the Future of Financial Services*** *(Invitation Only)*
11:40am-12.10pm	**Keynote Presentation: AI Observability: Can You Monitor a System You Don't Fully Understand?** • How should organizations monitor hallucinations, drift, tool calls, latency and agent behavior in production? • What metrics actually tell you whether an AI system is safe and performing as expected?	***Closed-Door Discussion Group: Security First: Safeguarding Financial Institutions in the Age of AI*** *(Invitation Only)*
12:10pm-12:40pm	**Main Stage Panel Discussion: Building Trust in Agentic AI for Financial Services: Evidence, Accountability, and Human Oversight** • How can financial institutions ensure AI agents make reliable and explainable decisions? • What evidence is needed to audit and validate autonomous AI actions? • Who should be accountable when AI agents make mistakes or cause financial harm? **Panelists:** Rhea R, *Head of AI & Emerging Banking Solutions Risk*, **M&T Bank** Elumalai Rajendran, *Vice President & Principal Engineer, Authentication & Identity Security*, **U.S. Bank**	***Closed-Door Discussion Group: From Automation to Intelligent Execution: Integrating Agentic AI into Financial Operations*** *(Invitation Only)*
12:40pm-01:30pm	*Lunch & Networking*	*Private Lunch Roundtable*

	AI in Finance Summit *Stage A*	*AI in Risk Management for Finance* *Stage B*
01:30pm-02:00pm	**Panel Discussion: Data Governance for Agentic AI in Finance: From Policies to Real-Time Controls** • How must data governance evolve for autonomous agents? • How can firms enforce data permissions across agent workflows? • What makes financial data ready for AI agents? • How can teams trace agent outputs back to source data? • Which governance controls should run continuously in production? **Panelists:** Aditya Krishnan, VP of AI Engineering, **MCbankNY**	**Panel Discussion: From Recommendations to Risk Decisions: How Much Autonomy Should AI Have in Finance** • Which risk decisions can AI make autonomously? • How should institutions test agents before deployment? • How can AI outputs work alongside rules and risk limits? • What audit trail ensures traceability and accountability? • How can firms stop agents and reverse their actions?
02:00pm-02:30pm	**Track Presentation: From Vision to Velocity: Reinventing Finance with AI** • Identifying and assessing opportunities for AI-driven transformation across the organization. • Exploring Model Mind as a use case for turning an innovative AI vision into a tangible solution. • Leveraging AI-powered development and creation processes to accelerate execution and bring ideas to life Tyler Frieling, Director, Emerging Technologies, **BLACKROCK** Stephanie Epstein, *Global Head of Multi-Manager Platform and Models Infrastructure* , **BLACKROCK**	**Track Presentation: Building Ethical and Responsible AI Frameworks** • Building scalable AI governance frameworks as fintechs grow • Managing agentic AI risks, autonomy, and human oversight • Embedding fairness, accountability, and explainability into AI systems Reema Gill, *Data/AI Governance – GRC Security* **WEALTHSIMPLE**
02:30pm-03:00pm	**Discussion Group: Alpha by Design: Multi-Agent AI for Next-Generation Portfolio Management** • Engineering multi-agent systems to combine market signals, research and alternative data • Using specialized AI agents for portfolio construction, optimization and risk analysis • Measuring alpha, robustness and decision quality in AI-driven investment strategies	**Discussion Group: Building Your AI Audit Trail: A Hands-On Workshop for Continuous Regulatory Assurance** • Capturing end-to-end AI decision and model lineage • Automating evidence collection for continuous regulatory assurance • Embedding audit-ready controls into production AI workflows
03:30pm-03:30pm	*Networking Break in Exhibition Area*	
03:30pm	*Combined AI in Finance & AI in Risk Management for Finance*	

	Main Stage
03:30pm-04:00pm	Keynote Presentation: The Future AI Workforce: Redesigning Financial Teams for Human + Agent Collaboration • Defining new roles across humans, copilots and autonomous agents • Reskilling teams for AI-driven decision-making • Redesigning performance, accountability and organizational structures David Micah Katz, *Vice President* BLACKROCK (LONDON)
04:00pm-04:30pm	Keynote Presentation: 300 Agents Later: Running AI at Scale in Financial Institutions • Keeping control when hundreds of agents run across the organization: ownership, monitoring and knowing what each one does • Change management: getting people to use agents in their daily work, so adoption doesn't stall after rollout • Securing agents in production as their access and autonomy grow Koto Ueda, *Head of US Operations / VP of Finance* GENERATIVEX
04:30pm - 04:40pm	*USE CASE SHOWCASE: Innovative AI Solutions* *Explore real-world AI use cases, practical applications, and innovative solutions transforming financial services.*
04:40pm-05:10pm	Keynote Presentation: From Legacy to AI-Ready Finance: Orchestrating Workflows Across Cloud and AI • Modernizing legacy financial systems to support scalable, AI-ready infrastructure. • Orchestrating intelligent workflows across hybrid cloud and AI environments. • Moving AI into production while ensuring security, governance, and operational resilience. Girish Gajwani, Vice President of Engineering – Securitized Products BARCLAYS INVESTMENT BANK
05:10pm-05:40pm	Panel Discussion: Is Your Financial Data Ready for an Agentic World? • What makes financial data truly agent-ready, and where are existing data ecosystems falling short? • How can financial institutions combine proprietary and external data to power more intelligent AI-driven decisions? • How are real-time data, contextual intelligence, and emerging protocols such as MCP transforming financial workflows? • How can organizations ensure data accuracy, reliability, and traceability as AI agents take on greater decision-making responsibilities? • What data capabilities, technology investments, and strategic partnerships will give financial institutions a competitive edge in an increasingly agentic world?
05:40pm-05:45pm	Chair Closing Remarks
05:45pm	Cocktail Reception & Prize Draw –
Private Dinner or After Party	

Ai in Finance NY Summit *AI Foundations & Enterprise Architecture for Financial Services* NY Summit April 13, 2027	
	AI in Finance - AI Foundations & Enterprise Architecture for Financial Services
8:00am	*Registration & Coffee in the Exhibition Area*
	Combined AI in Finance & AI Foundations & Enterprise Architecture
8:50am	*Chairperson's Opening Remarks & Icebreaker - –*
9:00am- 09:30am	Opening Panel Discussion: Is Your Data Holding Back Your AI Strategy? • Is your data infrastructure ready for real-time AI workloads? • How are you improving data quality at enterprise scale? • How do you connect fragmented data across the financial enterprise? • How are you governing data without slowing AI development? • What changes when your data platform moves from analytics to AI? Panelists: Kuntal Dutta, *Senior Director, Global Head of People Analytics & Workforce Management*, BNY Naresh Gunupuru, Executive Director, JPMORGAN CHASE
9:30am- 10:00am	Keynote Presentation: How We Evaluate AI Applications at a $10 Trillion Asset Manager • Assessing AI use cases based on business value, scalability, and measurable ROI. • Evaluating model performance, reliability, and risks in investment management. • Establishing governance and evaluation frameworks to move AI applications into production. Akash Nikam, *Head of AI Product & Engineering* VANGUARD
10:00am- 10:30am	Keynote Presentation: Q-Day Is Coming: Could Quantum Computing Break the Financial System Before Banks Are Ready? • Exposing vulnerabilities in RSA, ECC, and digital signatures as quantum algorithms challenge financial security. • Assessing the "harvest now, decrypt later" threat to encrypted transactions, banking data, and financial infrastructure. • Engineering post-quantum defenses through ML-KEM, hybrid cryptography, and crypto-agile architectures.
10:30am- 11:00am	Keynote Presentation: From LLM Prompts to Autonomous Workflows: Engineering Agentic AI for Financial Services • Beyond prompting: From LLM interactions to agentic workflows • Connecting AI to enterprise systems, data, and business processes • Engineering for trust: Security, governance, observability, and human oversight

	• From experimentation to production: Measuring value, managing cost, and scaling responsibly Todd Lyon, VP Engineering Manager TAB BANK	
11:00am- 11:30am	*Networking Break*	
11:30am- 12:00pm	Panel Discussion: The Productivity Measurement Problem: Proving AI's Financial Value • What should firms measure beyond employee time saved? • How do model costs and human review affect returns? • When does greater productivity create additional capacity or revenue? • How can teams distinguish AI impact from other improvements? • What results justify expanding a deployment? Panelists: Rania Svoronou, *Global Head of AI Design*, CITI	
12:00pm- 12:30pm	Keynote Presentation: The Infrastructure Mandate: The Architecture Decision That Will Define Your Next Five Years in Financial Services • Choosing the right architecture for scalable, AI-native financial services • Balancing performance, resilience, security and cost at enterprise scale • Future-proofing infrastructure for AI, data and next-generation workloads	
12:30pm- 01:00pm	Keynote Presentation: Building Beyond the Use Case: The Blueprint for a Repeatable AI Operating Model • Building a repeatable operating model to move AI from business problem to production and enterprise scale • How to establish clear ownership, decision rights, and accountabilities across business, technology, AI, risk and governance teams • Creating reusable development, evaluation and governance processes that accelerate deployment without compromising trust or accountability Ted Paris, *Head of AI2 US*, TD Bank	
01:00pm- 02:00pm	*Lunch & Networking*	*Private Lunch Roundtable -*
	AI in Finance ***Stage A***	***AI Foundations & Enterprise Architecture for Financial Services*** ***Stage B***
02:00pm- 02:30pm	Track Presentation: Building Trust in AI - Why Data Quality & Governance Matter Most in Finance • 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?	Track Presentation: From AI Experiments to Enterprise Infrastructure: Architecting the Bank for the Next Wave of AI • Moving from isolated AI pilots to reusable enterprise platforms • Modernizing data, compute and application architecture for AI • Building scalable foundations for production AI across the bank

02:30pm-03:00pm	**Track Presentation: How to Optimize Return on Information** • Distinguishing data transfer from value-creating data transformation. • Assigning clear roles to humans, automation, and AI agents. • Applying lessons from Cantor Fitzgerald Asset Management's transformation program. Paul-Adrien M, *Director, Head of AI* **CANTOR FITZGERALD ASSET MANAGEMENT**	**Track Presentation: Breaking Financial AI: Adversarial Testing, Model Attacks & Runtime Defense** • Red-team AI agents and uncover hidden vulnerabilities • Counter prompt injection, model manipulation & data poisoning • Engineer runtime controls for resilient autonomous systems Dhivya Nagasubramanian, *Vice President, AI Transformation & Innovation* **U.S. BANK**
03:00pm-03:30pm	**Interactive Workshop Session: Real-Time AI Decisioning: From Data Signals to Financial Action** • Architecting real-time AI for fraud, risk, credit and trading • Moving from batch analytics to continuous decisioning • Balancing speed, accuracy, explainability and control	**Interactive Workshop Session: The AI Data Plane: Moving Financial Data From Storage to Intelligence** • Real-time data movement for AI workloads • Vector, transactional and unstructured data architectures • Reducing the distance between data and inference
03:30pm-04:00pm	*Networking Break in Exhibition Area – Prize Draw & Giveaway*	
	Combined AI in Finance & AI in Financial Leadership & Transformation *Main Stage*	
04:00pm-04:30pm	**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, *Director, AI Quant* **BARCLAYS**	
4:30pm-05:00pm	**Keynote Presentation: AI Orchestration: Connecting Models, Agents, APIs & Core Banking Systems** • Orchestrating AI models and agents across complex financial ecosystems • Connecting agents to APIs, data platforms and core banking systems • Managing real-time workflows, latency and system interoperability • Building secure, scalable orchestration layers for production AI in finance	
5:00pm	Chair Closing Remarks	