



# FROM HYPE TO HABIT: OPERATIONALIZING DATA & AI FOR FINANCIAL SERVICES INNOVATION

[\*\*REGISTER NOW\*\* ➔](#)

2ND ANNUAL  
**DATA ANALYTICS & AI**  
FOR **FINANCIAL SERVICES**  
SUMMIT

MARCH 4-5, 2026 | HYATT REGENCY TORONTO

[WWW.DATAFINANCIALSERVICESSUMMIT.COM](http://WWW.DATAFINANCIALSERVICESSUMMIT.COM) #DAFS2026



# CONTENTS

**01. MESSAGE FROM THE PRODUCER**

**03. WHY ATTEND?**

**05. AGENDA AT A GLANCE**

**07. TESTIMONIALS**

**09. FULL AGENDA**

**02. INTRO: THE BEST IN DATA INNOVATION**

**04. NETWORK AND HAVE FUN**

**06. WHO ATTENDS?**

**08. SPEAKER LINEUP**

**10. HOW TO REGISTER**

# MESSAGE FROM THE PRODUCER

Dear Colleagues,

Welcome to the 2nd edition of the Data Analytics & AI for Financial Services Summit, which brings together the most **innovative, engaged, and influential data and analytics leaders in Canadian financial services**.

This summit is designed to support data, analytics, and AI leaders in **banking, credit unions, insurance, investment & asset management, wealth management & financial planning, and fintech**. Leave with **strategic guidance, practical tips, effective tools, and innovative technology** delivered by the brightest minds in the industry.

We have curated a two-day agenda packed with case studies, workshops, panel discussions, and roundtables, including four dedicated tracks focusing on technical, strategic, offensive, and defensive topics. We will provide you with an actionable plan on how to **accelerate your data transformation, harness the power of AI ethically, democratize data securely, scale architecture practices effectively, and find the ideal governance strategy that balances innovation with safety**.

Join us to make lasting connections and source best practices from leading agencies and organizations, including **BMO Financial Group, BCI, Euronet Worldwide, Mastercard, Sun Life, National Bank of Canada, Manulife, BDC, Coast Capital Savings, Co-operators, Royal Bank of Canada, Ontario Teachers' Pension Plan, National Bank of Canada**, and many more!

We look forward to welcoming you into the Data Analytics & AI for Financial Services community and hosting you this March!

Warm regards,



**Jeremy Behrman**  
Head of Content – Data Summit Portfolio  
Strategy Institute  
[jeremy@strategyinstitute.com](mailto:jeremy@strategyinstitute.com)





# THE BEST IN DATA INNOVATION

After a successful launch event in 2025, this summit is quickly becoming Canada's most exciting event featuring data, analytics, and AI experts across banking, insurance, investment management, credit unions, lending, pensions, and fintech industries. Secure your spot today to:

- ▶ Discover impactful real-world applications of data analytics on the **offensive and defensive** side.
- ▶ Escape the proof-of-concept trap to **scale predictive analytics and automation**.
- ▶ Deliver **real ROI** and measure the business impact of data and AI initiatives.
- ▶ Know what your data team will look like in 36 months and **develop talent pipelines** amidst all the rapid change.

# WHY ATTEND?

Join Canada's most influential data and analytics event dedicated to financial services! Whether you're scaling up your proof-of-concepts, driving democratization, or operationalizing risk analytics, this is where foundational strategy meets real-world execution. Here's why you won't want to miss joining us in 2026.



## STRATEGIC INSIGHTS

Learn how leading financial services organizations are turning black boxes into business value, operationalizing governance, and designing AI-ready infrastructure.



## HANDS-ON WORKSHOPS

Discover how to build guardrails for the Agentic Age and design AI products and multi-disciplinary teams.



## PEER NETWORKING

Fuel meaningful conversations over breakfast, meet one-on-one with solution providers, and meet new connections during interactive roundtables and speed networking.



## TARGETED TECH CONTENT

Go beyond buzzwords and dive into case studies on governance, AI execution, data literacy, risk-analytics, and explainability. Learn from organizations like Manulife, BDC, Coast Capital Savings, Co-operators, Royal Bank of Canada, and more.



## A GOOD TIME, GUARANTEED

There's plenty to enjoy throughout the summit, including an evening reception with cocktails and prizes. A perfect chance to wind down in a fun and friendly environment.

# NETWORK AND HAVE FUN

Networking and fun take centre stage at this year's event, offering the perfect balance of professional connections and social experiences. Start your day with engaging conversations at our networking breakfasts, where you can meet HR peers over coffee and fresh bites. In the evening, unwind at our cocktail reception, where great drinks, lively discussions, and new opportunities come together in a relaxed, social setting.



# AGENDA AT A GLANCE

From expert-led sessions and thought-provoking keynote speakers to interactive workshops and networking opportunities, every moment at the People Analytics Summit is designed to inspire, engage, and equip you with the insights and tools needed to succeed. Prepare for two days filled with innovative ideas, meaningful connections, and valuable takeaways that will elevate your experience and leave you motivated for what lies ahead.

## STRATEGIC INSIGHTS

- Navigate complex organizational challenges and accelerate **data-driven talent strategies**
- Leverage workforce analytics to **strengthen decision-making** and support value-driven HR initiatives
- Align business goals and people strategies for a more **unified, high-performing organization**

## WORLD-CLASS CONTENT

- Discover actionable approaches to **optimize workforce planning** and employee engagement
- Explore **trends in HR technology, policy, and analytics** shaping the future of work
- Gain insights from **top HR leaders**, people analytics experts, and industry innovators

## NETWORK

- Participate in **industry roundtables featuring CHROs**, people analytics leaders, and workforce strategists
- Connect and unwind at the **evening networking reception** with peers and industry experts
- Schedule **one-on-one meetings** with solution providers and experts

## FUTURE TRENDS

- Understand the implications of workforce policy changes and **emerging labour regulations**
- Explore equity, inclusion, and **the social impact of workforce decisions** across organizations
- Stay ahead of evolving people analytics trends and the **future of employee-centred strategies**

# WHO ATTENDS?

We pride ourselves on having attendees from some of the most credible and fast-moving financial services organizations in Canada. This is your opportunity to join them and be a part of the incredible story of Data Analytics & AI for Financial Services 2026



# TESTIMONIALS

Don't just take our word for it! Here's what some of our previous delegates have said about this incredible summit.

“

“Helpful speaker sessions showcasing a depth of expertise across speakers, great networking opportunities and valuable workshops!”



“

“Yes, I was happy to be invited as a VIP. It allowed me to hear from seasoned industry professionals and take insights and connections back to CIBC for future collaboration.”



“

“Knowledgeable speakers. Great networking opportunities, room for inspiration and idea sharing / generation.”



“

“I love learning and listening to the panellists, and the speakers were inspiring.”



“

“Great event to network.”



# SPEAKER LINEUP

MANY MORE 

Our agenda is delivered by people analytics experts across Canada and the United States. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



**Lori Bieda**  
Chief Data & Analytics Officer, North American Personal & Business Bank  
**BMO Financial Group**



**Jennifer Hartfield**  
Senior Vice President, Corporate Data & Operations  
**BCI**



**Cecilia Tamez**  
Chief Strategy Officer  
**Euronet Worldwide**



**Terry Hickey**  
Chief Technology Officer  
**Ontario Teachers' Pension Plan**



**Jo Greenwood**  
Vice President, AI & Data Growth Office  
**Mastercard**



**Cecile Tao**  
Vice President, Analytics and Data  
**Van City**



**Rebecca Oakes**  
Vice President, Advanced Analytics  
**Equifax Canada Co.**



**Sathya Parthasarathy**  
VP, App Delivery – Architecture, Technology & Data  
**CAA Club Group**



**Chris Tornato**  
Chief Digital Officer  
**Manitoba Agricultural Services Organization**



**Robin Sooklal**  
Vice President, Privacy & Data Governance  
**Symcor**

# SPEAKER LINEUP

MANY MORE 

Our agenda is delivered by people analytics experts across Canada and the United States. Not only will you get to hear from world-class speakers at the top of their game, but you also get to meet and network with them.



**Parama Ray**

Assistant Vice President

**Canada Life**



**Ankit Misra**

Director, AI Governance – AI Risk Management, Enterprise Advanced Analytics and AI  
**CIBC**



**Sumeet Bhatia**

Senior Director | Head of Data Strategy & Enablement

**Sun Life**



**Julien Crowe**

Senior Director, AI Products, Practice, R&D, & Partnerships

**National Bank of Canada**



**Craig Colarossi**

Director, Investment Operations & Analytics, Office of the CIO  
**Ontario Teachers' Pension Plan**



**Mo Mirza**

Director, Platform Engineering, Data & Technology

**OMERS**



**Rob Hollerin**

Director, Enterprise Analytics & Data Science

**Coast Capital Saving**



**Simon Sulyma**

AVP, Information Risks

**Manulife**



**Marcus Chun**

SVP, Head of Digital Strategy & Advisor Services

**Richardson Wealth**



**Peter Berdeklis**

CTO

**Independent Trading Group (ITG)**

# FULL AGENDA

Day 1 – Wednesday, March 4, 2026

7:30 AM

## REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **data leaders in financial services**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices**, and prepare for the day ahead.

8:50 AM

## OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience.

9:00 AM

## KEYNOTE: TECH TALENT

### Positioning People at the Heart of Data & AI

Innovative technologies are transforming businesses, but at their core, success depends on people. Build breakthrough technologies while reshaping recruitment, employee engagement, leadership, and learning and development processes. As organizations adopt new workflows, understanding the evolving relationship between humans and these technologies is crucial. Take back to your office strategies to:

- Define the role of humans in AI-driven decision-making and operations.
- Implement effective change management strategies for breakthrough technologies.
- Cultivate a culture of continuous learning and upskilling to align with new advancements.

*Adapt your workforce to thrive and embrace new technologies by placing people at the centre of transformation.*

**Lori Bieda**, Chief Data & Analytics Officer, North American Personal & Business Bank, **BMO Financial Group**

9:30 AM

## KEYNOTE PANEL DISCUSSION: AI STRATEGY

### From Hype to Habit: Making AI a Trusted Part of Financial Services Operations

Financial services leaders face mounting pressure to transform AI enthusiasm into measurable business value — all while satisfying stringent governance, risk, and compliance expectations. This keynote will set the tone for the summit by addressing the critical path from experimentation to enterprise adoption. Develop a blueprint to:

- Establish a clear AI vision aligned with regulatory requirements and corporate strategy.
- Balance innovation speed with robust oversight, ethics, and customer trust.
- Measure and communicate the tangible business outcomes of AI investments.

*Achieve a practical framework for embedding AI into the operational fabric of your organization to minimize risk and maximize long-term value.*

**Olga Tsubiks**, Director, AI & Data Product, **Royal Bank of Canada**

**Julien Crowe**, Senior Director, AI Products, Practice, R&D, & Partnerships, **National Bank of Canada**

**Rebecca Oakes**, Vice President, Advanced Analytics, **Equifax Canada Co.**

**Parama Ray**, AVP of Business Modernization, **Canada Life**

10:15 AM

## SPEED NETWORKING! MAKE MEANINGFUL CONNECTIONS

Grow your network by meeting like-minded individuals to share your latest ideas and projects with:

- Enjoy a quick icebreaker, exchange LinkedIn information, and **build lasting business relationships**.
- Achieve your conference networking goals in a **fun and agile fashion**.
- Join a community** of data leaders in financial services and gain invaluable support.

10:30 AM

## INDUSTRY EXPERT: AGENTIC AI

### Building Trustworthy Agentic AI Through Unified Data and Context

Agentic AI can only deliver real business value when it operates on a unified data and governance foundation. Without it, AI agents risk providing inconsistent answers, exposing sensitive data, and driving poor decisions. Organizations relying on fragmented silos or ad hoc integrations inevitably face compliance risks and a loss of trust. Leave with a blueprint to:

- Ensure every AI-driven decision aligns with security, privacy, and regulatory mandates.
- Eliminate data silos and deliver consistent, explainable outcomes across business functions.
- Scale agentic AI initiatives from pilots to enterprise-grade deployments that accelerate automation and decision-making.

*Operationalize AI to responsibly drive measurable outcomes.*

**Arif Rajwani**, Senior Data & AI Evangelist, **Denodo Technologies**

11:00 AM

## REFRESHMENTS BREAK & EXHIBITOR LOUNGE: VISIT BOOTHS & SOURCE EXPERTISE

- Explore the latest **data analytics technology** and strategies catered to financial services with our industry-leading sponsors.
- Share your challenges with the **biggest innovators** in the business.
- Schedule **one-to-one private meetings** for personalized advice.

# FULL AGENDA

Day 1 – Wednesday, March 4, 2026

11:30 AM

## TRACK 1: STRATEGIC

HIGH-LEVEL PLANNING, BUSINESS ALIGNMENT, & ORGANIZATIONAL TRANSFORMATION

### PANEL DISCUSSION: DATA ACCESS & TRANSPARENCY

#### Navigating the Next Wave of Regulations

From open banking to new privacy laws, the pressure on financial institutions to make data more transparent — while protecting sensitive information — has never been higher. Align legal, technical, and cultural priorities to meet rising transparency expectations. Create a roadmap to:

- Prepare for upcoming regulations like Bill C-27 and their implications for financial services.
- Build secure API frameworks that enable data sharing with trusted partners.
- Craft customer consent and transparency experiences that drive trust and loyalty.
- Operationalize data access policies without slowing down innovation.

*Advance your organization's ability to balance transparency with security and compliance to build trust and meet regulations.*

**Jose Lara**, Director, Service Enablement & Process Optimization, **Scotiabank**

**Raymond Onami**, Vice President, Privacy & Data Governance, **Symcor**

## TRACK 2: TECHNICAL

TOOLS, FRAMEWORKS, & IMPLEMENTATION STRATEGIES FOR DATA, AI, & ANALYTICS

### PANEL DISCUSSION: THE MODERN DATA ECOSYSTEM

#### Scaling Value Realization in Financial Services

Financial institutions sit on a wealth of data, but too often, siloed systems and legacy technology prevent them from unlocking its full potential. Map how leading banks, insurers, and fintechs are modernizing data ecosystems to accelerate value realization.

Adopt best practices to:

- Break down silos between transactional, market, customer, and operational datasets.
- Leverage cloud-native data platforms to achieve real-time analytics at scale.
- Embed self-service data access while maintaining security and compliance.
- Measure and communicate the business value of modern data architectures.

*Optimize how your organization extracts value from data to drive insights, efficiency, and growth.*

**Peter Mercurio**, PhD, Senior Director, Pricing & Portfolio Optimization, **CIBC**

**Rob Hollerin**, Director, Enterprise Analytics & Data Science, **Coast Capital Saving**

**Chantale Boulanger**, Director, Performance and Client Shared Data, **IA Canada**

**Bran Korovljevic**, Senior Manager, Business Intelligence Enterprise Reporting, **Go Easy Financial**

12:15 PM

## TRACK 1: STRATEGIC

HIGH-LEVEL PLANNING, BUSINESS ALIGNMENT, & ORGANIZATIONAL TRANSFORMATION

### CASE STUDY: TRUST

#### Data is a People Challenge: Building Trust, Embedding Governance, and Growing Leaders at BCI

When British Columbia Investment Management Corporation (BCI) realized its centralized data resources weren't meeting the needs of specialized business functions, leadership knew the solution wouldn't be found in technology alone, it would require a people-first strategy. Backed by strong executive sponsorship, BCI restructured its data program to adopt a "franchise model," embedding governance directly into business lines while maintaining a central access point for standards, frameworks, and support. Take away specific solutions to:

- Build deep trust across your organization through consistent, transparent data cycles and an agile approach to reworking reports and foundations.
- Create innovative career pathways by rotating talent across business lines while maintaining continuity in core engineering expertise.
- Embed product managers and trained business-facing data leaders, closing the gap between technical execution and investment management decision-making.
- Iterate quickly and efficiently to match the evolving needs of both governance and operational teams.

*Transform your data operating model into a people-powered engine to accelerate decision-making and strengthen governance.*

**Jennifer Hartfield**, Senior Vice President, Corporate Data & Operations, **BCI**

## TRACK 2: TECHNICAL

TOOLS, FRAMEWORKS, & IMPLEMENTATION STRATEGIES FOR DATA, AI, & ANALYTICS

### CASE STUDY: GOVERNANCE

#### Operationalizing Data Governance to Enable Trust, Compliance, and Innovation

Data governance is no longer a theoretical exercise, but for many organizations, moving from frameworks and policies to day-to-day action remains elusive. Embed governance into your operations, toolchains, and culture to enable both compliance and innovation at scale. Achieve a step-by-step action plan to:

- Embed governance into data pipelines and workflows — not just documentation.
- Build internal coalitions across legal, security, operations, and data teams to ensure shared accountability.
- Scale metadata, lineage, and quality monitoring through automation and smart tooling.

*Optimize governance as a strategic asset that fuels responsible AI, trusted reporting, and data democratization.*

**Joe Greenwood**, Vice President, AI & Data Growth Office, **Mastercard**

# FULL AGENDA

Day 1 – Wednesday, March 4, 2026

12:45 PM

## TRACK 1: STRATEGIC HIGH-LEVEL PLANNING, BUSINESS ALIGNMENT, & ORGANIZATIONAL TRANSFORMATION

### INDUSTRY EXPERT: DATA AUTOMATION

#### Driving Efficiency in Data Engineering Through Automation

Adopt automated tools for building, monitoring, and managing data pipelines. Master the success factors to:

- Identify and implement automated tools that streamline data pipeline processes and reduce operational overhead.
- Enhance the reliability and performance of data pipelines through continuous monitoring and automated alerts.
- Shift the focus from routine tasks to strategic initiatives that optimize data architecture and drive business value.

*Improve efficiency and effectiveness in data engineering by leveraging automation. .*

## TRACK 2: TECHNICAL TOOLS, FRAMEWORKS, & IMPLEMENTATION STRATEGIES FOR DATA, AI, & ANALYTICS

### INDUSTRY EXPERT: DATA INTEGRATION

#### Modernizing Data Integration for the AI Era: How to Build Trust, Scale, and Speed into Your Cloud Ecosystem

As data ecosystems grow more complex and AI initiatives take centre stage, organizations need more than just pipelines — they need an intelligent foundation that delivers trusted data, at scale, in real time. Reimagine data integration as a unified, governed, and AI-powered capability across hybrid and multi-cloud environments. Walk away with an action plan on:

- Delivering end-to-end data integration across cloud, on-prem, and SaaS sources.
- Embedding data governance, lineage, and quality into every integration workflow.
- Supporting GenAI and real-time analytics with cloud-native, elastic data pipelines.

*Amplify the impact of your data integration strategy to ensure reliable, governed, and intelligent data at scale.*

1:15 PM

## NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest data analytics issues..**
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial services colleagues in data**.

2:15 PM

## EXHIBITOR LOUNGE VISITS: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

2:45 PM

## WORKSHOPS – 1 HOUR (Please select one)

Break into smaller groups of approximately 25 industry peers to work through “how-to’s” and apply them to your business scenario.

### WORKSHOP A: GENAI SECURITY

#### Ditch ChatGPT: Master the Art of Securing Your Enterprise Retrieval-Augmented Generation (RAG)

Off-the-shelf generative AI tools like ChatGPT can be powerful - but in financial services, they pose significant compliance, security, and privacy risks. That's why leading institutions are ditching public LLMs in favour of secure, enterprise-grade RAG systems that integrate directly with vetted internal datasets. Build, govern, and scale an AI platform that serves as a trusted decision-support engine for regulated environments. Take away specific solutions to:

- Design a secure RAG architecture that separates model capabilities from sensitive data, ensuring no confidential information leaks into public AI training sets.
- Implement strong governance frameworks to monitor and audit AI outputs for accuracy, bias, and regulatory compliance.
- Integrate RAG into existing analytics platforms so users can access AI-powered insights without abandoning approved workflows or tools.
- Develop a talent strategy for AI stewardship, upskilling teams to prompt effectively, validate responses, and maintain institutional knowledge integrity.

*Excel in deploying a domain-specific RAG environment that delivers secure, compliant, and creative AI insights.*

*Led by Simon Sulyma, AVP, Information Risk, Manulife*

OR

# FULL AGENDA

Day 1 – Wednesday, March 4, 2026

## WORKSHOP B: TEAM PERFORMANCE IN THE AI ERA

### Designing for Neurodiversity: Building Teams and AI that Learn from Every Mind

Most organizations have a neurodiversity policy on paper. Far fewer have created working environments and technologies that truly embrace the many ways people perceive, process, and apply new knowledge. Cognitive diversity is not just a talent issue, it's a competitive advantage for human performance and for training better AI systems. Develop a blueprint to:

- Reimagine work practices to accommodate a wide range of learning and processing styles, from communication norms to meeting structures.
- Design digital interactions and apps that account for different ways people engage with technology, ensuring inclusivity is built into every user experience.
- Train AI models on diverse datasets, understanding that models built from a narrow slice of data will miss the richness of human cognition and context.
- Build governance frameworks that ensure both people and AI systems can adapt, self-correct, and thrive in complex environments.

*Bolster human and AI capabilities by creating inclusive environments where diverse minds thrive to drive innovation and performance. .*

*Led by Sumeet Bhatia, Senior Director, Head of Data Strategy & Enablement, Sun Life*

3:45 PM

## REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of data innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

4:15 PM

## PANEL DISCUSSION: DATA TEAM STRATEGY

### Goodbye Dashboard, Hello Search Query: What Will Your Data Team Look Like in 36 Months?

Dashboards are quietly becoming relics of the past. In their place, natural language search and conversational analytics are emerging as the new front door to enterprise data. How will this shift fundamentally change the shape, skills, and strategy of your data team over the next three years? This isn't just about technology, it's about how human interaction with data is evolving, and what that means for hiring, workflows, and organizational design. Adopt best practices to:

- Redefine the skillset of your data team, moving from dashboard builders to data product managers, conversational model trainers, and semantic layer architects.
- Architect your data stack for speed and flexibility, making search-powered analytics as secure and governed as traditional BI tools.
- Build trust in AI-powered analytics, ensuring that search results are transparent, explainable, and aligned with governance standards.
- Anticipate the impact on data culture, empowering non-technical stakeholders to directly interrogate the data while freeing data teams to focus on higher-value innovation.

*Transform your data team into a strategic enabler of real-time decision-making to accelerate insight, improve agility, and drive business impact.*

**Dave Skura** ,AVP, AVP Data Technical Architecture, **IGM**

**Peter Berdeklis**,CTO, **Independent Trading Group (ITG)**

4:45 PM

## CASE STUDY: SCALE

### Escape the Proof-of-Concept (POC) Trap: Scaling Predictive Analytics and Automation in Financial Services

Many financial institutions are stuck in “proof-of-concept purgatory” — running promising predictive analytics and automation pilots that never make it to production. The result? Wasted investment, frustrated teams, and missed competitive advantage. Take back to your office strategies to:

- Diagnose the POC trap to mitigate initiative stall and the organizational patterns that cause it.
- Execute from prototype to production using frameworks for transitioning models and workflows into operational systems.
- Expedite data readiness and infrastructure scaling, ensuring quality, accessibility, and integration across the enterprise.
- Build trust across stakeholders communicating model transparency, fairness, and compliance to business leaders and regulators.

*Reduce barriers to scale, aligning technology, governance, and talent to ensure predictive analytics and automation deliver real results.*

# FULL AGENDA

Day 1 – Wednesday, March 4, 2026

5:15 PM

## END OF DAY ONE SUMMARY & CLOSING COMMENTS FROM YOUR HOST

Review the key solutions and takeaways from today's sessions. Source a summary of action points to implement in your work. Discuss tomorrow's highlights!

5:20 PM

## EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC, & NETWORKING

- **Relax and unwind** with tasty cocktails after a long day of learning.
- Don't miss your chance to **win fun prizes** by scanning your badge at our exhibitor booths.
- Make dinner plans with your **new connections** and enjoy the best of what Toronto nightlife has to offer. Just be sure to set your alarm for Day 2!

6:20 PM

## CONFERENCE ADJOURNS TO DAY 2



# FULL AGENDA

Day 2 – Thursday, March 5, 2026

7:30 AM

## REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

- Start your day off right and connect with **data leaders in financial services**.
- Get to know your **industry peers** and colleagues over a delicious breakfast.
- Source practical tips, discuss **best practices**, and prepare for the day ahead.

8:50 AM

## OPENING COMMENTS FROM YOUR HOST

Gain insight into today's sessions so you can get the most out of your conference experience.

9:00AM

## KEYNOTE: AI STRATEGY

### It's All About the Network: Leading AI in One of the World's Largest Visible Transaction Networks

With operations across 175 countries, Euronet has faced some of the toughest challenges in operationalizing AI for financial inclusion, fraud prevention, and central bank digital currencies. Key to this challenge is distinguishing between traditional AI and GenAI — and why GenAI is less a technical breakthrough and more a powerful new user interface for business transformation. Master the success factors to:

- Integrate AI without replacing your entire core infrastructure, embedding it into existing processes and aligning it with both technology and people.
- Build AI models that “self-heal” through parametric feature engineering tailored to specific fraud patterns and evolving market dynamics.
- Operationalize AI in a governance-heavy environment, working with privacy officers to turn data governance from a compliance burden into a trust-building advantage.
- Leverage a globally distributed talent pool to design AI models that are internationally adaptable, supporting cross-border AML and financial crime prevention.
- Drive AI adoption in markets with unique constraints, balancing innovation with the realities of infrastructure, regulation, and cultural diversity. .

*Impact growth and inclusion with the power of AI to accelerate innovation, enhance accessibility, and drive measurable business results..*

**Cecilia Tamez**, Chief Strategy Officer & Head of Data Science, **Euronet Worldwide**

9:30 AM

## INDUSTRY EXPERT: TRUST AT SCALE

### Operationalizing Data Quality and Observability in Complex Pipelines

As data pipelines grow more distributed and dynamic, trust in data has never been more critical — or more difficult to maintain. Whether you're building AI models, powering analytics, or reporting to regulators, bad data erodes business value and confidence. Automate data quality monitoring with actionable insights. Create a roadmap to:

- Implement end-to-end data observability to automatically detect and resolve issues in freshness, volume, schema, and lineage across your pipelines.
- Define and enforce data SLAs while integrating quality rules directly into governance workflows to align business and technical standards.
- Unify monitoring and alerting across data, infrastructure, and applications to quickly trace and resolve anomalies at the system level.
- Boost trust through user-driven metadata enrichment, trust signals, and collaboration features that help bridge technical and business teams.

*Heighten confidence in your organization's data by implementing robust observability and governance practices.*

10:00 AM

## ROUNDTABLE DISCUSSIONS – 1 HOUR (PLEASE SELECT ONE)

Break into smaller groups of approximately 20 industry peers to work through a series of questions and challenges. Share knowledge on a particular topic that is most critical to your role and business.

### 1. The AI Risk Equation: Balancing Innovation with Compliance

How to rapidly experiment with generative AI, predictive analytics, and automation while ensuring adherence to evolving regulations like OSFI guidelines, Bill C-27, and cross-border data rules.

### 2. From Data Chaos to Data Confidence: Fixing Fragmented Architectures

Practical strategies to unify siloed data environments, improve lineage and trust, and support near real-time decision-making in a hybrid or multi-cloud infrastructure.

### 3. Monetizing Data Responsibly Without Eroding Customer Trust

Exploring models for productizing insights, embedding analytics into services, and generating new revenue streams — while maintaining ethical boundaries and avoiding reputational risk.

### 4. Fraud Prevention in the Age of Real-Time Payments

Adapting data models, integration pipelines, and anomaly detection capabilities to combat the speed and sophistication of financial fraud in instant transaction environments.

# FULL AGENDA

Day 2 – Thursday, March 5, 2026

11:00 AM

## TRACK 1: OFFENSIVE

USE CASES FOCUSED ON REVENUE GROWTH, CUSTOMER EXPERIENCE, & MARKETING

### CASE STUDY: DATA ACCESS

#### Empowering the Business: Accelerating AI-Enabled Applications with Frictionless Data Access

As enterprises race to embed AI into business applications, one challenge stands out: how to make trusted, domain-relevant data instantly available without compromising governance. Develop an architecture that unites flexibility and control, enabling frictionless governance and faster innovation. Walk away with a plan to:

- Design data architectures that enable secure, domain-specific access while maintaining enterprise oversight.
- Build trust in AI outputs by ensuring transparency and reliability of underlying data.
- Reduce deployment cycles from months to weeks through automation, enablement, and collaborative governance.

*Deliver value in a fraction of the time and empower business teams to rapidly build and deploy AI-driven apps—without waiting months for data access or approvals.*

**Mo Mirza**, Director, Platform Engineering, Data & Technology, **OMERS**

## TRACK 2: DEFENSIVE

USE CASES FOCUSED ON FRAUD PROTECTION, RISK MITIGATION, & RESILIENCY

*Moderator: Neha Baloja, Senior Manager, Channel Performance & Marketing Analytics, **Rogers Bank***

### CASE STUDY: MITIGATE RISK

#### Operationalizing Risk Analytics: From Insight to Intervention

Financial services organizations have invested heavily in risk analytics capabilities, yet too often the insights remain stuck in dashboards, reports, or siloed systems — failing to inform timely interventions. Rethink processes, governance, and technology integration to bridge the gap between predictive insight and real-world response. Achieve a step-by-step action plan to:

- Deliver measurable impact by identifying high-value use cases and risky scenarios.
- Embed analytics into frontline workflows so insights trigger timely and consistent actions.
- Integrate with operational systems - linking risk models with transaction processing, case management, and compliance platforms.
- Balance automation and human oversight, defining thresholds for automated responses versus expert review.

*Transform how you operationalize risk analytics to drive timely interventions, enhance decision-making, and mitigate high-value risks.*

**Aparna Manchanda**, SVP and Head, Risk and Analytics, **DMI Finance**

11:30 AM

## TRACK 1: OFFENSIVE

USE CASES FOCUSED ON REVENUE GROWTH, CUSTOMER EXPERIENCE, & MARKETING

### CASE STUDY: DATA GOVERNANCE

#### Operationalizing Governance for Innovation and Impact: Turning Guardrails into Growth

Data governance is often seen as the cost of compliance — a check-the-box exercise. But when approached strategically, governance can be a powerful enabler of innovation, insight, and trust. Adopt best practices to:

- Reposition governance as a strategic asset and a source of innovation rather than a bottleneck.
- Target the sector-specific risks, regulatory demands, and the most fragile data touchpoints.
- Choose the right tools: When to invest in an enterprise-grade platform vs. building a lean, integrated governance stack.
- Evangelize data literacy as a key governance accelerator.

*Bolster your data governance to drive innovation, enhance compliance, and stay ahead of the competition.*

**Raymond Onami**, Director, Data Governance, **Symcor**

## TRACK 2: DEFENSIVE

USE CASES FOCUSED ON FRAUD PROTECTION, RISK MITIGATION, & RESILIENCY

### CASE STUDY: RISK SCORING

#### Proactive Fraud Detection and Transaction Risk Scoring

A tier-one financial institution faced rising fraud attempts across digital banking channels, especially account takeovers and real-time payment scams. To counter this, the bank implemented a real-time transaction risk scoring engine that integrates device intelligence, behavioural biometrics, geolocation, and historical account data. Take away specific solutions to:

- Reduce false positives by 40% through adaptive machine learning models that learn from investigator feedback.
- Cut fraud losses by double digits within the first year of deployment.
- Enhance resiliency by integrating with disaster recovery protocols so that fraud monitoring remains active even during core banking outages.

*Improve fraud prevention to secure customer trust and digital banking channels while enabling legitimate activity.*

# FULL AGENDA

Day 2 – Thursday, March 5, 2026

12:00 PM

## TRACK 1: OFFENSIVE

USE CASES FOCUSED ON REVENUE GROWTH,  
CUSTOMER EXPERIENCE, & MARKETING

### CASE STUDY: FROM MIGRATION TO MODERNIZATION

#### Building Resilient Data Platforms in Financial Services

Financial enterprises face mounting pressure to modernize data ecosystems while ensuring resilience, compliance, and security. Implement robust ingestion pipelines and tailor configuration-specific solutions to meet evolving business needs. Develop a blueprint to:

- Leverage a microservices architecture to enable scalability, flexibility, and faster innovation.
- Design a data platform that balances automation with manual interventions for maximum reliability.
- Embed data strategy, security, and engineering principles to ensure long-term adaptability and compliance.

*Advance your data platform to ensure resilience, compliance, and adaptability in a modern fintech environment.*

**Asif Saiyad**, Data Architect, **Fidelity Investments**

## TRACK 2: DEFENSIVE

USE CASES FOCUSED ON FRAUD PROTECTION,  
RISK MITIGATION, & RESILIENCY

### INDUSTRY EXPERT: REAL-TIME DATA, REAL-WORLD PROTECTION

#### Modern Integration for Risk and Fraud Defence

Fraudsters move fast — your data needs to move faster. In a landscape where threats evolve by the minute, relying on siloed, outdated systems leaves organizations vulnerable. Harness modern data integration to unify critical information, detect risks early, and safeguard compliance. By enabling secure, real-time data flows from ERP systems, legacy databases, and other vital sources, your organization can outpace fraud while maintaining trust and operational resilience. Walk away with an action plan on:

- Centralizing critical intelligence by modernizing pipelines to unify data from diverse, distributed systems.
- Stopping threats early with advanced replication tools that detect suspicious activity before escalation.
- Synchronizing securely across the enterprise to meet compliance requirements and protect sensitive assets.

*Heighten real-time data access to strengthen fraud prevention, enhance security, and drive smarter risk management.*

12:30 PM

## NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

- Meet interesting speakers and pick their brains on the **latest data analytics issues**.
- **Expand your network** and make connections that last beyond the conference.
- Enjoy great food and service while engaging with your **financial services colleagues in data**.

1:30 PM

## EXBIIITOR LOUNGE VISITS: VISIT BOOTHS & WIN PRIZES

- Browse through different sponsor booths and **test drive new technology**.
- Enter your name for a chance to **win exciting prizes**.
- Take advantage of **event-specific offers** and special content.

1:45 PM

## PANEL DISCUSSION: AGENTIC AI

### Who's Your Banker? Implementing Agentic AI in Financial Services

Agentic AI, AI systems that can plan, reason, and act autonomously, represent the next leap in financial technology innovation. But in a highly regulated, risk-sensitive industry, implementing such systems requires a careful blend of technical capability, governance, and business transformation. Source your plan of action by:

- Integrating AI with legacy infrastructure without disrupting mission-critical processes or data flows.
- Optimizing governance, risk, and accountability to ensure agentic AI decisions remain transparent, auditable, and aligned with regulatory expectations.
- Building human-AI collaboration models that preserve decision oversight while unlocking speed and efficiency.
- Ensuring talent and organizational readiness, including skills, structures, and cultural shifts needed to leverage autonomous agents effectively.
- Measuring ROI, evaluating both tangible business benefits and intangible gains, such as customer trust and employee productivity.

*Optimize customer service and efficiency by operationalizing agentic AI responsibly to turn automation into a strategic advantage.*

**Cecile Tao**, Vice President Analytics and Data, **Van City**

**Ankit Misra**, Director, AI Governance – AI Risk Management , Enterprise Advanced Analytics and Artificial Intelligence, **CIBC**

**Jose Lara**, Director, Service Enablement & Process Optimization, **Scotiabank**

# FULL AGENDA

Day 2 – Thursday, March 5, 2026

2:30 PM

## CASE STUDY: EXPLAINABILITY

### Turning Black Boxes into Business Value: Explainable AI in Financial Services

As AI adoption accelerates across fraud detection, credit scoring, and customer personalization, financial institutions face mounting pressure to ensure models are transparent, trustworthy, and regulator-ready. Yet many AI systems still operate as opaque "black boxes," leaving business leaders, auditors, and customers uncertain about how decisions are made and putting adoption at risk. Create a roadmap to:

- Drive trust and transparency by demystifying model decisions, using techniques for translating complex algorithms into clear, human-understandable reasoning.
- Balancing performance and interpretability by selecting the right modeling approach for regulatory, operational, and customer needs.
- Optimize regulatory alignment by harmonizing explainability requirements under evolving AI and data privacy regulations in multiple jurisdictions.
- Embed explainability in workflows by integrating interpretability checks into model development, deployment, and monitoring cycles.
- Drive adoption by using explainability to meet compliance and identify new business opportunities and refine customer experiences.

*Master AI innovation by turning explainability from a compliance burden into a competitive advantage.*

3:00 PM

## EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

- Enjoy **exclusive sponsor demos** and experience the next level of data innovation firsthand.
- Meet one-on-one with leading solution providers to **discuss organizational hurdles**.
- **Brainstorm solutions** and gain new perspectives and ideas.

3:30 PM

## CASE STUDY: AI-READY INFRASTRUCTURE

### Aligning Your Data Stack with Emerging Demands

Many organizations are finding their data platform grinding under the weight of increasing regulatory requirements, growing unstructured datasets, and the sudden demand for generative AI pilots. Legacy warehouses cannot keep pace with streaming data from trading systems, fraud monitoring tools, and mobile banking channels. Move to a hybrid lakehouse architecture for structured workloads, AI model training, and event streaming — all under a single governance framework. Take back to your office strategies to:

- Modernize the core by migrating from a single on-premises warehouse to a cloud-native, hybrid lakehouse.
- Enable real-time AI to feed fraud detection and credit risk scoring models with second-by-second transaction data.
- Govern at speed through automated lineage, masking, and compliance reporting across AI workloads.
- Engineer for resilience including building multi-cloud failover between providers to meet strict uptime and regulatory standards.

*Adapt your data infrastructure to enable secure, real-time AI, resilient operations, and compliance at scale.*

**Tayeb Nedjari**, Enterprise Architect, Data, Analytics, & AI, [BDC](#)

**Alexandre Panunto**, Solution Architect, Data, Analytics, & AI, [BDC](#)

4:00 PM

## CASE STUDY: AI

### Harnessing Unstructured Data to Build an Investment-Grade AI: The Future of Decision Intelligence in Private Markets

Imagine an AI that can analyze every historical deal, performance trend, and reputational signal to challenge human assumptions and strengthen investment decisions. Harnessing and building trust around years of unstructured data is key to developing an agentic AI agent that can synthesize decades of deal data to deliver predictive, explainable intelligence to the investment committee. Leave with a guide on how to:

- Harness and structure unstructured data to fuel high-stakes investment decisions.
- Execute technologies enabling consumable, governed, and auditable data pipelines.
- Optimize AI architectures that are redefining governance, transparency, and accountability in institutional investing.

*Deploy value adding AI and data-driven foundation for better, faster, and more confident investment decisions.*

**Terry Hickey**, Chief Technology Officer, [Ontario Teachers' Pension Plan](#)

**Craig Colarossi**, Director, Investment Operations & Analytics, Office of the CIO, [Ontario Teachers' Pension Plan](#)

4:15 PM

## CONFERENCE CONCLUDES

# HOW TO REGISTER?

**REGISTER NOW** 

## IN-PERSON PASS

### FULL TWO-DAY ACCESS:

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables, and one week of pre-event networking via our dedicated platform.

### FACE-TO-FACE NETWORKING:

Connect and build valuable relationships with our audience of thought leaders.

### 5-STAR TREATMENT:

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location.

### EXPO HALL:

Form lasting business partnerships, test drive the latest solutions, and gather exclusive content from industry-leading experts.

### SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges.

### ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event.

#### EARLY BIRD

EXPIRES ON 2<sup>nd</sup> JAN, 2026

**\$1,095**

#### REGULAR TICKET

**\$1,595**

## VIRTUAL PASS

### TWO-DAY LIVE STREAM ACCESS:

Tune into keynote sessions, panel discussions, and case studies with real-time Q&A from the comfort of your home.

### VIRTUAL NETWORKING:

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool.

### VIRTUAL EXPO HALL:

Form lasting business partnerships, test drive the latest solutions, and gather exclusive content from industry-leading experts.

### SPEAKER PRESENTATIONS:

Take home PowerPoints and white papers addressing your biggest challenges.

### ON-DEMAND ACCESS:

Conveniently rewatch any session for up to 3 months after the event.

#### EARLY BIRD

EXPIRES ON 13<sup>th</sup> FEB, 2026

**\$1,095**

#### REGULAR TICKET

**\$1,395**

### REGISTER FOR DELEGATE PASS

To check if you are eligible for a group rates, please contact:

**Louis Youpa**  
Delegate Sales Associate

Email: [louis@strategyinstitute.com](mailto:louis@strategyinstitute.com)

### GROUP RATES

Enhance your team collaboration, ROI, and industry presence with our existing group discounts for groups of 3+.

Speak with Louis about our best rates:  
Email: [louis@strategyinstitute.com](mailto:louis@strategyinstitute.com)

2ND ANNUAL  
 **DATA ANALYTICS & AI**  
FOR FINANCIAL SERVICES  
SUMMIT  
MARCH 4-5, 2026 | HYATT REGENCY TORONTO