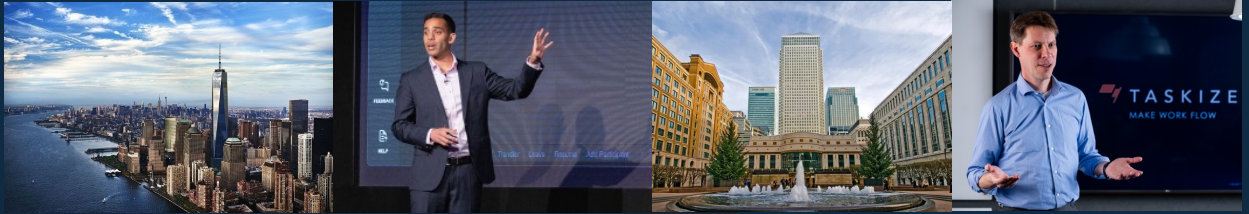




Taskize Forum 2024

New York, 17 April 2024 | London, 25 April 2024

AGENDA



2.00pm – Session 1 'The Banks' Perspective'

Following a welcome address, this fireside chat tackles structural, operational, and regulatory challenges in the middle- and back-office and pinpoints the differences fintechs can deliver.

In New York, Taskize's James Pike speaks with Adam Watson (Global Head of Commercial Product for Custody, **BNY Mellon**) and James Kearney (Consultant, **MBO Partners**).

In London, James is joined by Nitesh Pai (Director of Custody Product Development & Connected Data, **BNY Mellon**), Sean Kennedy (Associate Director, **Alpha FMC**) and Jeff King (Global Head of Settlements & Asset Servicing Product) at Citibank.

With well over a century of banking experience between our speakers, James Pike draws on 17 years at **Morgan Stanley** as Global Head of Institutional Client Services, following seven years at **JPMorgan Chase & Co.**

Adam joined **BNY Mellon** from **JPMorgan** where he was Commercial Product Manager for custody, while Nitesh joined BNY following significant roles with **JPMorgan** and **Deutsche Bank**.

James Kearney spent more than three decades with **Vanguard**, his most recent role being Head of Global Investment Ops while Sean spent close to 15 years at **Vanguard** latterly as Global Head of Operational Governance and Regulatory Reporting. Finally, Jeff King has been with **Citibank** for almost three decades, his first role being Head of UK Settlements in 1995.

3.00pm – Session 2 'Interoperability in Action'

This panel session with Taskize partners demonstrates the value multi-platform integrations deliver in securities settlements, corporate actions and collateral management. As well as how to measure their impact on regulatory risk, team capacity and client service.

We'll be joined by partners from across the Taskize ecosystem: **Cognizant Meritsoft** (Daniel Carpenter, CEO), **Symphony** (Elena Parigi Adragna, Operations Workflows Director and Rob Friend, Product Director) and **Xceptor** (John Bevil, Product Director for Capital Markets and John Joseph, Head of Sales Engineering).

Session 3 – "Live Demos of New Integrations"

Head of Product, Kishan Bharwad presents a live demo of the Taskize platform to bring to life everything discussed today. We'll take an exception to resolution within a partner platform, spotlighting a new integration with **Cognizant Meritsoft**.

We'll then walk through counterparty communication from Taskize via email, Microsoft Teams and – unveiling a second new integration – two-way communication with **Symphony**.

RSVP

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5pm to 7pm
Drinks reception