



Trusted Insight for Independent Oversight

2026 Fund Governance & Regulatory Insights Conference
Thursday, March 5 – Friday, March 6

Thursday, March 5

7:45 – 8:45	Breakfast and Registration	<i>Ballroom Foyer</i>
8:45 – 8:55	Welcome Carolyn McPhillips, MFDF	<i>Corcoran Ballroom</i>
8:55 – 10:00	Board Leadership Across the ETF Journey Jessica Reece, Ropes and Gray (Moderator) Neil Bathon, Fuse Research Network Elizabeth Marchetti, SEI Jill Iacono Mavro, BNY	<i>Corcoran Ballroom</i>
10:00 – 10:30	Break	<i>Ballroom Foyer</i>
10:30 – 11:25	Balancing the Narrative on Active and Passive Karen Barr, IAA (Moderator) Theresa Hamacher, Morningstar Funds Sean Kenney, MFS Eric Pollackov, Invesco	<i>Corcoran Ballroom</i>
11:30 – 12:00	Fireside Chat with SEC Division of IM Director Carolyn McPhillips, MFDF Brian Daly, US Securities and Exchange Commission	<i>Corcoran Ballroom</i>
12:00 – 1:00	Lunch	<i>Seasons</i>
1:05 – 1:35	Building Trust in Boardroom Tiffany R. Reeves, Faegre Drinker LLP	<i>Corcoran Ballroom</i>
1:40 – 2:45	Effective Dissent and Decision-Making in the Boardroom Caroline Davis Schoenecker, Deloitte (Moderator) Lisa Borders, Six Circles and Multi-Strategy Access Funds Alan Bowser, Eaton Vance Jennifer McPeek, First American Funds	<i>Corcoran Ballroom</i>

Thursday, March 5 (continued)

2:45 – 3:15	Break	<i>Ballroom Foyer</i>
3:15 – 4:15	Board Effectiveness Breakouts	
	Board Self-Assessment	<i>Algonquin</i>
	Carla Teodoro, Sidley Austin, LLP	
	John Kelly, Victory Funds	
	Partnering Effectively with Third Parties in Recruitment	<i>Douglass</i>
	Leslie Beckbridge, MFDF	
	Ashton McFadden, McAlpine McFadden	
	New Product Approvals	<i>Smithson</i>
	Mable Lung, UBS Funds	
	Julian Sluyters, Venerable Variable Insurance Trust	
4:20 – 5:30	AI & Cyber Risk in Action	<i>Corcoran Ballroom</i>
	A Hands-On Boardroom Challenge	
	Patricia Edwards, EY	
	Bill Hobbs, EY	
	Matt Rancourt, EY	
5:30 – 6:15	Optional Sessions	
	Fostering the Next Generation of Directors	<i>Smithson</i>
	Angela Brock-Kyle, Guggenheim Funds	
	Jody Foster, Voya Funds	
	Lessons and Takeaways for Onboarding to Fund Boards	<i>Algonquin</i>
	(CURRENT DIRECTORS ONLY)	
	Lisa Borders, Six Circles and Multi-Strategy Access Funds	
6:00 – 8:30	Welcome Reception and Dinner	

Friday, March 6

7:30 – 8:30	Breakfast Directors Only Main	<i>Douglass Ballroom Foyer</i>
8:30 – 9:30	Washington Update Sara Vargo, MFDF (Moderator) Margaret Carey, FMR Joanne Medero, Nuveen Investments Mahlet Makonnen, Williams & Jensen PLLC	<i>Corcoran Ballroom</i>
9:35 – 10:40	Breakout Sessions	
	Tokenization in Focus: Board Oversight in the Digital Asset Era Val Dahiya, Morrison Foerster Kelley Howes, Morrison Foerster	<i>Douglass</i>
	Board Oversight of Tender Offer, Interval Funds, and BDCs Paul Stevens, Dechert	<i>Algonquin</i>
	Strengthening Board Oversight of Sub-Advisors Gwen Williamson, Faeger Drinker	<i>Smithson</i>
10:40 – 10:55	Break	
10:55 – 11:25	Insights on the Evolving Role of Regulating Auditors Buddy Donohue, BNY Funds Erica Williams, Former Chair at PCAOB	<i>Corcoran Ballroom</i>
11:30 – 12:30	Oversight of Alternative & Private Funds in RICs Sanjeev Handa, Carlyle Tactical Private Credit Fund (Moderator) Matt Giordano, KPMG Bill Renahan, Blackstone Ryan Brizek, Simpson Thatcher Anne Kitzmire, Thornburg Income Builder Opportunity Trust	<i>Corcoran Ballroom</i>
12:30	To -Go Lunch	