



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 McPeck, 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 Board Oversight of Tender Offer, Interval Funds, and BDCs Paul Stevens, Dechert Strengthening Board Oversight of Sub-Advisors Gwen Williamson, Faeger Drinker	<i>Douglass Algonquin 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 Kritzmire, Thornburg Income Builder Opportunity Trust	<i>Corcoran Ballroom</i>
12:30	To -Go Lunch	