

Democratizing Data & Financial Services Solutions Forum (On-Demand Video)

Free Virtual Event

On-Demand Video



Democratizing Data & Financial Services Solutions in a Post-Pandemic Tech and Data-Driven Climate

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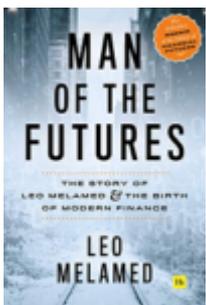
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EVENT OVERVIEW

The ultimate networking and strategic leadership and communications event for c-suite professionals (IROs, CFOs, general counsel, CMOs) at financial services and fintech companies and advisories. This event will examine key issues facing the financial services c-suite in this post-pandemic world. This event brings together industry leaders to discuss topics, including:

- The Importance of Brand-Building In Financial Services Post-Pandemic with a Focus on D&I & Financial Literacy
- Democratizing Data Via New Innovative Markets & Platforms
- Lessons learned from the evolution of the markets.

As the technologies of the Fourth Industrial Revolution continue to evolve, the value of data is indisputable. We will examine the role of data in the industry as well as how brands are using data to better inform the decisions they make when supporting their stakeholders.



FIRESIDE CHAT

Hosted by **Lisa Leiter**, EVP, Financial Communications, Edelman

- **Leo Melamed**, Founder of Financial Futures and Chairman Emeritus of CME Group. Author, ***Man of the Futures***

FIRESIDE CHAT

The Importance of Brand-Building In Financial Services Post-Pandemic with a Focus on D&I & Financial Literacy

Hosted by **Don Yount**, CEO, Critical Mention

- **Barri Rafferty**, Head of Communications and Brand Management, Wells Fargo

PANELS

Defining a New Era of Digital Transformation in Financial Services Via Next-Gen Tools & Solutions

Moderated by **Silvia Davi**, Chief Marketing & Communications Officer, 280 CapMarkets & President, V&S Strategic Consulting

- **Manuel Goncalves**, Managing Director, Global Chief Communications Officer, BNY Mellon
- **Caleb Silver**, Editor-in-Chief, Investopedia
- **Kristina Fan**, CEO, 7 Chord

Democratizing Data Via New Innovative Markets & Platforms

Moderated by **Raymond Kahn**, SVP & Head of Markets at U.S. Real Estate Market (USREM)

- **Adrian Crockett**, Chief Strategy and Product Officer, OpenFin
- **Ikechi David Nwabuisi**, Founder & CEO, Tribl, A Platform for Diaspora Commerce
- **Charles Poliacof**, Chief Executive Officer, Knoema
- **Adam Zarazinski**, CEO, Inca Digital

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EVENT MODERATOR



**Don Yount, Chief Executive
Officer & President,
Critical Mention**

Don Yount joined Critical Mention after serving as president and CFO of Corente, Inc., a cloud networking company acquired by Oracle Corp. Previously, Don served as executive vice president, COO and board member of TVI Corp. (NASDAQ:TVIN), a supplier of health and safety technology devices. Prior to TVI, Don was operating principal at Mid-Atlantic Venture Funds. Earlier in his career, Don served in executive corporate strategy and finance positions at several high-tech firms in the telecom, datacom, software development and media industries. He received a BS in Business Administration and an MBA from the University of North Carolina, where he won the Richard H. Jenrette Fellowship and was a Dean's Scholar. Don also served as chair of the Early Stage East Venture Conference and was a board member of the Greater Philadelphia Venture Group, now called PACT.

PANEL MODERATORS



Silvia Davi, Chief Marketing & Communications Officer, 280 CapMarkets & President, V&S Consulting

Silvia Davi is a seasoned global corporate communications, marketing and business development executive and advisor with over 20 years of experience. Ms. Davi is a recognized expert in all aspects of marketing particularly strategic communications, PR, branding, content strategy, relationship management, broadcast communication, and international public affairs across key industry sectors with experience from global communications agencies, in-house Fortune 500 corporations, start-ups, and nonprofits. Silvia is also an experienced strategic partnership, business development, governance, ESG executive with an expertise in corporate citizenship, diversity and inclusion and serving on Boards.

She has spent most of her career in leadership marketing, corporate communications and development roles focused on managing external and internal communication programs, coaching executives, visibility campaigns, growth strategies and innovation plans, branding, digital media, and implementing positioning strategies for special situations such as M&A deals, crisis management, IPO's, restructurings, turnarounds, executive visibility, and broad-based reputation management for organizations such as Nasdaq, Instinet, Marsh & McLennan Companies, Broadcast Music Inc., Thesys Technologies and 280 CapMarkets.

An expert in business innovation, capital markets, and fintech, Silvia ran global communications and brand at Nasdaq for nearly a decade and has received numerous industry accolades such as Innovation Finance's "Women in Fintech

Powerlist” in 2017 and Markets Media “Reputation Management” Award in 2018. Silvia is a creative multifaceted and multilingual professional, who has also served as an Adjunct Professor at Hofstra University in the School of Journalism, Media Studies, and Public Relations. Key specialty sectors include financial services/fintech, technology, media, entertainment, and wellness/lifestyle.



Raymond Kahn, SVP & Head of Markets at U.S. Real Estate Market (USREM)

Ray Kahn has over 25 years of experience in capital markets, including leading trading, risk management, and clearing business units at global banks and an exchange. He has an extensive background in building, managing, and transitioning financial businesses undergoing regulatory, technology, economic, and infrastructure changes. Ray was an early identifier of the potential for emerging technologies, including Blockchain/DLT, to produce strategic efficiencies in market infrastructure, reduce risks, and improve economic returns. This knowledge has led to Ray’s current focus on the convergence of traditional and digital markets with an objective of helping deploy the best characteristics of both to produce a more efficient financial ecosystem.

Ray is a founding member and Head of Markets for USREM, which is developing a platform providing Institutional Investors the ability to invest in and trade “fractionalized” positions in commercial real estate. He is also the founder of Archon Advisors LLC which advises companies on designing solutions

that generate financial, operational, risk, or capital efficiencies. He advises companies focusing on crypto data/analytics/surveillance, cloud-based risk/collateral/portfolio management, digital asset tokenization, blockchain start-ups, on-demand payments, and SPACs.

Ray served as President of ICE's Creditex unit, focusing on electronic bond and credit derivatives execution. Prior to joining ICE, Ray managed Barclays' Global OTC Derivatives Clearing business, building the unit from scratch into one of the industry's leading clearing FCMs (Risk Magazine's 2013 Clearer of the Year). During this time, Ray served as a leading expert on topics such as Basel III capital, clearing capacity and concentration, collateral management, and margin optimization, speaking regularly with global regulators, trade associations, and institutional investors. His extensive risk management experience includes serving as Barclays' Global Head of Prime Services Risk during the credit crisis and building/managing Lehman's Relationship Loan Hedging unit.

Ray holds an MBA from the Wharton School of Business at the University of Pennsylvania and a BA degree from the University of Michigan.

Ray has been a frequent speaker at global industry conferences on the potential of technology in financial markets since 2015, including FED, IOSCO, FIA, World Federation of Exchanges, and digital/crypto-focused events. He served on the FIA's Executive and FIATech Boards and remains an active member of the FIA's Innovators Selection Committee. Ray is also involved with the Global Blockchain Business Council (GBBC).

FIRESIDE CHAT GUESTS



Barri Rafferty, Head of Communications and Brand Management, Wells Fargo

Barri Rafferty is the head of Communications, where she oversees Wells Fargo's reputation management, enterprise brand strategy, external and internal communications, brand advertising, sponsorships, heritage and museums. She directs a team of more than 500 communicators and marketing professionals who serve various stakeholders, including the company's approximately 266,000 employees. A strategic and collaborative leader, Barri plays a key role in helping redefine the company's purpose, voice and brand narrative.

Barri joined Wells Fargo in July 2020 from Ketchum, where she was the agency's president and CEO – the first woman at the time to be the CEO of a top-five public relations agency. At Ketchum, she helped transform and build reputations for some of the world's largest and most respected companies and brands, including Gillette, P&G, Wendy's, 3M, Frito-Lay, and HPE.

A strong advocate of diversity and inclusion, Barri was a founding member of Omniwomen – an initiative to increase the number, seniority, and influence of women in leadership roles. Barri serves on the national board of Step Up, an organization empowering girls from under-resourced communities to become confident, college-bound, and career focused. She also currently serves as a board member for the Women Business Collaborative, which is helping accelerate parity for business

women, and is a committee chair for C200, a global organization for women business leaders.

Barri's thought leadership has been cited by CNBC, FORTUNE, The Wall Street Journal, Fast Company, and others. In 2020, Barri was named Outstanding Agency Professional of the Year by PRWeek, and included in PProvoke's 2020 Influence 100 list of influential in-house communicators from around the world. She also will be recognized as a 2020 Matrix award honoree by the New York Women in Communications.

She holds a master's degree in corporate communications from Boston University and an undergraduate degree from Tulane University. She is based in New York City.



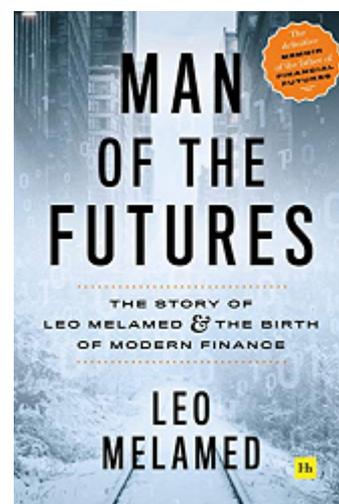
Leo Melamed, Founder of Financial Futures and Chairman Emeritus of CME Group. Author, [“Man of the Futures”](#)

Leo Melamed is globally recognized as the founder of financial futures. In 1972, as chairman of the Chicago Mercantile Exchange (CME Group), he revolutionized markets with the creation of the International Monetary Market (IMM)—the first futures market for financial instruments and the launch of currency futures. In the years that followed, Melamed led the CME in the introduction of a diverse number of financial instruments, including Treasury Bills in 1976, Eurodollars in 1981, and stock index futures in 1982. In 1987, Melamed again revolutionized trading by introducing Globex® the world's first futures electronic trading system. In 1992, he became its

founding chairman.

Twenty years after their inception, Nobel Laureate in Economics, Merton Miller, named Financial Futures as *“the most significant innovation of the past two decades.”* At the close of the last century, Leo Melamed was named by the former editor of the Chicago Tribune *“among the ten most important Chicagoans in business of the 20th Century.”* Mr. Melamed’s prize winning memoirs, *“Escape to the Futures,”* (Wiley, 1996), as well as his continuation memoirs, *“For Crying Out Loud,”* (Wiley, 2009), have been translated into Chinese, Japanese, Korean, Russian and Portuguese. He is also the author of *“Leo Melamed on the Markets,”* (Wiley, 1993), and *“The Tenth Planet”* a science fiction novel, (Bonus Books, 1984). He was editor of an anthology, *“The Merits of Flexible Exchange Rates,”* (George Mason University Press, 1988). Many of his essays and lectures can be found on the website.

Man of the Futures is the definitive memoir of Leo Melamed. It recounts Melamed’s journey from Holocaust survivor and accidental runner at the Chicago Mercantile Exchange (CME), to one of the most prominent leaders in the world of finance who mingled with US Presidents and world leaders.



The Chicago Mercantile Exchange, today the CME Group, is the world’s largest futures market where Melamed serves as Chairman Emeritus, is a member of its Board, and chairman of its Strategic Steering Committee. Melamed has been an adviser to the U.S. Commodity Futures Trading Commission (CFTC) and has served as special adviser on futures markets to governments worldwide. In 1982, Mr. Melamed led the futures industry in the creation of the National Futures Association

(NFA), an independent self-regulatory organization. He served as its founding chairman and remains as its Permanent Special Advisor. In 2010 he was appointed to the International Advisory Council (IAC) of the China Securities Regulatory Commission, (CSRC). Mr. Melamed serves on the Board of the Scholar Rescue Fund, LEAP Innovations, The Chicago Council on Global Affairs, and the Becker Friedman Institute of the University of Chicago.

Leo Melamed holds Doctor of Letters from the University of Illinois, Loyola University, DePaul University, and Doctor of Humane Letters from Sacred Heart University. In 2007 he was appointed Honorary Dean of Beijing University. He is the recipient of numerous awards, including: The 2005 CME Melamed-Arditti Innovation Award, the 2008 William F. Sharpe Lifetime Achievement Award, the *2013 Risk Magazine* Lifetime Achievement Award, and the 2016 State of Illinois Order of Lincoln Award, the highest award conferred by the State of Illinois. Leo Melamed, an attorney by profession holds a Doctor of Laws Degree from John Marshall Law School. He is chairman and CEO of Melamed & Associates, Inc., a global consulting enterprise founded in 1993.

GUESTS



**Manuel Goncalves, Chief
Communications Officer, BNY
Mellon**

Manuel is a public relations and communications executive with 20+ years' experience developing and leading proactive media

relations, corporate reputation and internal communications programs in a variety of industries, including professional services, financial services and tech. He currently serves as the Chief Communications Officer for BNY Mellon, where he oversees all aspects of communications – external, internal and client communications.

Throughout Manuel's 20-year career, he has been integral to driving the communications programs of Fortune 500 companies and large privately held firms. He believes that innovation and disruption are key to the evolution of the communications profession, and applies a startup mentality (experiment, measure and iterate quickly) to helping companies implement change and convey their value propositions. He is a builder and leader of high-performing communications teams, and is a frequent speaker on topics such as building diverse and inclusive teams, using data and insights to convey the business value of communications, the future of storytelling and audience engagement, and driving reputational narratives that bring a company's culture to life.

Prior to joining BNY Mellon in April 2019, Manuel spent 12 years as the Executive Director of PR and Corporate Communications at KPMG LLP, where he was responsible for all of the firm's business function communications, including media relations, reputation and internal communications programs – centered on enhancing visibility for our client services and solutions, driving executive visibility initiatives, thought leadership programs, and business capabilities. In addition, he served as the firm's spokesman and led all crisis/issues management programs, working closely with the CEO and management committee to drive communications strategy and execution.

Earlier in his career, Manuel was the Senior Communications Manager for Travelport Worldwide Ltd., where he oversaw corporate communications and reputation management for the company's Americas region. He also served as a Senior

Communications Manager, he was essential to communications activities for the Eastern region of Allstate Insurance Company, that included serving on the critical, boots on the ground, response team immediately following Hurricane Katrina. In addition, he was a member of the Tech & Consumer practice at The MWW Group.

Manuel graduated from Roger Williams University with a Bachelor's degree in Communications. In addition to serving on the Board of the PRSA Foundation, he is a member of the Page Society and The Wisemen – both professional organizations for senior communications executives. He resides in Mendham, New Jersey with his wife, and is an avid mountain biker and martial artist.



Adrian Crockett, Chief Strategy and Product Officer, OpenFin

As Chief Product & Strategy Officer, Crockett works with OpenFin's large and fast-growing client base to build the financial industry's app and workspace infrastructure. In this role he leads OpenFin's product development and strategy across all offerings.

In 2012, Crockett co-founded Pellucid Analytics, an integrated platform that streamlines the creation of investment banking pitchbooks. He served as Chief Executive Officer until December 2019, when the firm was acquired by a leading market data vendor.

Prior to launching Pellucid, Crockett spent two decades in the

sell-side where he headed investment banking strats groups at Credit Suisse, Merrill Lynch, and Deutsche Bank. In these roles he oversaw quantitative corporate finance advisory practices and digital transformation efforts.

He earned his masters degree in Technology Management from Columbia University, and completed his undergraduate and postgraduate research degrees at the University of Technology Sydney. He also holds the Chartered Financial Analyst and Chartered Accountant designations.



Kristina Fan, CEO, 7 Chord

Kristina Fan is the Founder of 7 Chord, a predictive analytics firm in Brooklyn, NY. BondDroid, 7 Chord's award-winning proprietary AI engine, empowers bond traders and investors with predictive pricing and liquidity signals. Kristina is responsible for realizing the firm's vision of building machine intelligence systems that identify and adapt to regime changes.

7 Chord is alumni of Barclays Accelerator, powered by TechStars, Class of 2017, and alumni and data provider to FintechSandbox. 7 Chord was Benzinger Fintech Listmaker in the "Best in AI" category in 2020 and 2019. It was named one of the "Most Promising Fintech Companies to Watch" in 2019 by Harrington Starr.

Before 7 Chord, Kristina spent 20 years in fixed income in various trading and market structure roles, most recently at

BlackRock. There, she represented the firm on the CME CE Risk Committee and various industry forums, including ISDA Clearing Risk Working Group. She started her career at Bear, Stearns with her very first project related to the immediate aftermath of Long-Term Capital Management's collapse. Her senior colleagues' role was detailed in the famous book by Roger Lowenstein, "When Genius Failed."

Kristina later worked at JP Morgan in the years leading up to the mandatory clearing of the OTC derivatives, where she was part of an award-winning product development team (see Risk Magazine feature article "OTC Clearing Service of the Year: JP Morgan" Jan 10, 2012). She gained invaluable business management experience by overseeing a virtual team of developers and being involved in all aspects of implementation, budgeting, and pricing of the brand-new technology-focused business line.

She has a BA in Economics (Honors) from NYU and MS in Finance from the London School of Economics. She currently serves on the advisory board of Markets Media Women in Finance Award. Kristina was born in the former USSR and moved to the US after witnessing the country's economic collapse and hyperinflation in the mid 90ies.



Lisa Leiter, EVP, Financial Communications, Edelman

Lisa Leiter is an executive vice president in the financial communications and capital markets group, advising insurers,

asset managers and other industry clients on media strategy, thought leadership, ESG communications and executive transitions. She is an award-winning content creator with more than two decades of experience as a broadcaster, print reporter and media strategist. She was most recently the Chief Content Officer for the Executives' Club of Chicago, where she created the annual Tech Outlook program and a Technology and Innovation Series. Lisa is a former anchor/reporter for *Crain's Chicago Business*, where she launched the daily online video show, Chicago Business Today, and produced the Entrepreneurs in Action video series. Prior to that, Lisa was a correspondent for Bloomberg Television, reporting on the bond market and financial news from the Chicago Board of Trade. Lisa also was an on-air correspondent for CNN Financial News, a senior producer for Moneyline with Lou Dobbs, and a staff writer for The Miami Herald. Lisa graduated magna cum laude from George Washington University, where she was managing editor of the GW Hatchet.



**Ikechi David Nwabuisi,
Founder & CEO, Tribl, A
Platform for Diaspora
Commerce**

Ikechi Nwabuisi, a Nigerian-American, is the founder and CEO of TRiBL, a messaging app for Pan-African commerce. This is an all-in-one crypto platform using a GroupMe-meets-like experience to pool money and streamline commerce within Black communities across the United States, Nigeria, and other countries around the world. The company has partnered with VISA and crypto firms **Circle Internet Financial & Paxos Brokerage Firm*** to enable interoperable exchange of digital

currencies worldwide.

Born and raised in Houston, Ikechi played football at Northwestern University. While attending McCombs School of Business, he helped launch a diversity accelerator DivInc, and worked as a VC @Capital Factory. As a Techstars alum, he is one of less than 1% of Black founders to receive venture capital funding. Techstars is the global platform for investment and innovation.

You can follow Ikechi on Twitter and IG @buisi_x



Charles Poliacof, Chief Executive Officer, Knoema

Charles Poliacof is CEO of Knoema, the data technology platform which makes the world's data discoverable and usable. Previously, Charles served as Chief Revenue Officer at Visible Alpha where he was responsible for building and overseeing the commercial arm of the organization including sales, marketing, support, account management and strategy. Prior to Visible Alpha, Charles was Managing Director at Novus where he focused on sales, growth and business development. Before Novus, he was Co-Head of Trading and a Portfolio Manager at Centurion Investment Partners until its acquisition in 2011. Charles Co-Founded Applied Analytics building technology for automated trading strategies, and began his investment career at the Schonfeld Group. Charles is also very passionate about philanthropy. He founded and is Chair Emeritus of the Junior Board of Seeds of Peace, and previously served on the advisory

board of the non-profit, Portfolios With Purpose. Charles holds a BS in Applied Mathematics and Economics from Stony Brook University.



Caleb Silver, Editor in Chief, Investopedia

Caleb Silver is a business journalist and the Editor in Chief of Investopedia. He previously worked as the Director of Business News at CNN, the Executive Producer of CNN Money and was a senior producer on The Situation Room with Wolf Blitzer.



Adam Zarazinski, CEO, Inca Digital

Adam is the CEO and co-founder of Inca Digital, a data analytics and intelligence company for the cryptocurrency ecosystem. He is a former active duty US Air Force Judge

Advocate, where he served as a prosecutor at Joint Base Andrews and operations law attorney in Afghanistan. He has managed and developed projects around new technology for international organizations like INTERPOL and the World Health Organization. He is a 2020 Atlantic Council Millennium Fellow. When not working, Adam enjoys practicing Brazilian Jiu-Jitsu. One time he rolled with Relson Gracie in Brazil. He lost.

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