

K&L GATES ETF Think Tank

December 5, 2023

K&L Gates, Boston

11:00 - 11:30	REGISTRATION
11:30 - 11:35	OPENING REMARKS <i>Presented by Stacy Fuller, Partner - K&L Gates</i>
11:35 - 12:20	HOW TO START AN ETF <i>Moderator: Peter J. Shea, Partner - K&L Gates</i> <i>Speakers: Matthew Cannata, Senior Vice President, General Counsel - Income Research + Management; Joseph Higgins, Distribution, Commercial Lead - ACA Foreside; Danielle Rutsky, ETF Senior Product Manager - Nasdaq; and Stephen Scaringe, Senior Vice President, Business Development - Ultimus Fund Solutions</i>
12:20 - 12:45	LUNCH OFFERED
12:45 - 1:30	GLOBAL ETF DEVELOPMENTS <i>Moderator: C. Todd Gibson, Partner - K&L Gates</i> <i>Speakers: Hazel Doyle, Partner - K&L Gates; Phil Coolidge, CEO - Global Fund Connections; Deborah Fuhr, Managing Partner and Founder - ETFGI; and Jonathan Shelon, Chief Operating Officer - KraneShares</i>
1:30 - 1:45	BREAK
1:45 - 2:25	CONVERSIONS <i>Moderator: Frank H. Na, Partner - K&L Gates</i> <i>Speakers: Joel D. Almquist, Partner - K&L Gates; Steve Cook, Managing Director, Product Management, Exchange Traded Funds - Harbor Capital Advisors; Tim Huver, Managing Director, Exchange Traded Fund Services - Brown Brothers Harriman; and Lindsay Selick, Assurance Partner - Cohen & Co.</i>
2:30 - 3:15	REGULATORY DEVELOPMENTS PART I <i>Moderator: Kevin Gustafson, Partner - K&L Gates</i> <i>Speakers: Stacy Fuller, Partner - K&L Gates; Brandon Clark, Senior Vice President, Director ETF Business - Federated Hermes; Joseph Keenan, Independent Board Chairman - WisdomTree Digital Trust; and Frank Koudelka, Senior Vice President and Global ETF Product Specialist - State Street</i>
3:15 - 3:30	BREAK
3:30 - 4:15	REGULATORY DEVELOPMENTS PART II <i>Moderator: Trayne S. Wheeler, Partner - K&L Gates</i> <i>Speakers: Abigail P. Hemnes, Partner - K&L Gates; Andrew DeLorme, Managing Director and Managing Counsel - State Street Global Advisors; Rick Redding, CEO - Index Industry Association; and Ryan Sullivan, Director - FTSE Russell</i>
4:20 - 5:00	CRYPTO <i>Moderator: Rich F. Kerr, Partner - K&L Gates</i> <i>Speakers: Ryan T. Carney, Partner - K&L Gates; Gerry O'Shea, Head of Global Insights - Hashdex; Jamie Paturelli, Director, Exchange Traded Products - NYSE; Sarah Tadtman, Senior Counsel - Cboe; and Ira Wurcel, General Counsel - BitGo</i>
5:00 - 7:00	CLOSING REMARKS & RECEPTION <i>Presented by Stacy Fuller, Partner - K&L Gates</i>