

2025 ASSET MANAGEMENT AND INVESTMENT FUNDS CONFERENCE

12:00-12:30 p.m.	Check In and Lunch
12:30-12:45 p.m.	Welcome and Introductory Remarks Speaker: Clair Pagnano (Lead Practice Area Leader – Asset Management and Investment Funds, K&L Gates)
12:45-1:30 p.m.	Product Innovation Part 1: Trends in the Registered Funds Market • ETF Share Classes • Retail Access to Private Markets • Interval Funds/Tender Offer Funds • Exchange Funds • Expanded Co-Investment Relief Speakers: Christopher “Kit” Sechler (Chief Legal Officer, John Hancock Funds), Mark Goshko (Partner, K&L Gates), Abigail Hemnes (Partner, K&L Gates), and George Zornada (Partner, K&L Gates)
1:30-1:45 p.m.	Alternative Investments in Retirement Plans Speaker: Robert Sichel (Partner, K&L Gates)
1:45-2:00 p.m.	Break
2:00-2:45 p.m.	Product Innovation Part 2: Trends in the Private Funds Market • State of the Fundraising Market • Growth in the Secondaries Market • Continued Retailization Speakers: TJ Bright (Senior Legal Counsel, Partners Capital), Vincent Calcagno (Head of U.S. Growth, Ocorian), Robert Leonard (Partner, K&L Gates), and Chris Phillips-Hart (Associate, K&L Gates)
2:45-3:30 p.m.	Product Innovation Part 3: Crypto and Digital Asset Evolution • CLARITY Act – Regulatory Framework for Digital Assets • GENIUS Act – Tokenized Money Market Funds • Tokenization of Securities Generally • Crypto Exchange Traded Products Speakers: Tanya Kerrigan (General Counsel and Chief Compliance Officer, Eaglebrook Advisors), Grant Butler (Partner, K&L Gates), Jon-Luc Dupuy (Partner, K&L Gates), and Rich Kerr (Partner, K&L Gates)
3:30-3:45 p.m.	Break

3:45 p.m.- 4:15 p.m.	Washington Update Part 1: Supreme Court Watch and SEC Enforcement • Private Right of Action under the 1940 Act • Enforcement Trends under New Administration Speakers: Trevor Donelan (Partner & Managing Director, AlixPartners), Neil Smith (Partner, K&L Gates), and Stephen Topetzes (Partner, K&L Gates)
4:15-5:00 p.m.	Washington Update Part 2: Regulatory Priorities for Asset Management • Reg Flex Agenda Generally under New Administration • Artificial Intelligence • Names Rule Compliance June 2026 • Marketing Rule updates Speakers: Jamie Peterson (Managing Director, Iron Road Partners), Lance Dial (Partner, K&L Gates), Pamela Grossetti (Partner, K&L Gates), and Pablo Man (Partner, K&L Gates)
5:00 p.m.	Closing Remarks
5:00 - 7:00 p.m.	Reception