

## **Innovation Cluster 2 – Financial Services**

3:30pm – 5:30pm on Monday, March 14, 2016

Fidelity Center for Applied Technology, 245 Summer Street, Boston, MA 02210

Fidelity Center for Applied Technology, located in the heart of Boston's Financial District, will host a **Boston-area Innovation and Entrepreneurship in Financial Services Panel and Q&A on Monday, March 14, 2016 from 3:30-5:30 PM**. This panel has been organized with the help of PDMA Boston. The Boston-area Panel and Q&A will feature a panel from the greater Boston-area innovation ecosystem of financial services and fintech.

Boston has a long history in financial services innovation. From the first mutual fund to the first venture capital firm, Boston has led the way. Today the financial services innovation cluster is composed of financial leaders in a number of sectors and fintech upstarts engaged in digital disruption. Learn the inside story of the innovation success and challenges in this cluster from our panel of industry experts. Following the panel, a moderated question and answer session will allow conference attendees to pick our panelists' brains.

The event takes place **Monday, March 14, 2016 from 3:30-5:30 PM at the Fidelity Center for Applied Technology**, located at 245 Summer Street, Boston MA 02210. Please join us for thought-provoking presentations and a lively discussion.

Note: this is an exclusive event for delegates of the ISPIM Innovation Forum, Boston.

### **Fidelity Center for Applied Technology**

#### **Panel Host and Description**

For over 68 years Fidelity has been a company driven by innovation and inspired by technologies that promise our customers a future without limits. Here at the Fidelity Center for Applied Technology (FCAT), we're dedicated to customer success by serving as an innovation catalyst for new ideas and a focal point for technology leadership across Fidelity's global organizations.

FCAT was established in 1999 to serve as a bridge, linking Fidelity's technology resources with Fidelity executives, who seek innovative approaches to tactical and strategic business challenges.

At FCAT we listen to customer needs, explore emerging technologies, apply the best ideas, and promote creative solutions. Whether the changes are simple incremental improvements or major disruptive innovations, FCAT is dedicated to informing our employees and transforming the way we do business.



### **PDMA Boston Chapter**

The New England Chapter of the PDMA is focused on managing organizational and innovation processes for consistently producing a successful pipeline of new products and services. Our chapter is community-based and we welcome all professionals in the Greater Boston area to take part in our activities.



Panel Moderator:

- **Susan Loconto Penta, Co-founder and Managing Partner, MIDIOR Consulting**

Panelists include:

- **Rick Smyers, VP Center for Accelerated Innovation, Fidelity Investments**
- **Yury Shpektor, Director, Financial Services, Perficient**
- **Jim Tessmer, SVP Client Technology Services, Global Product & Platform Solutions, State Street Corporation**
- **Jean Donnelly, Executive Director, FinTech Sandbox**
- **Jed Cahill, Manager, Enterprise Patent Office, Wells Fargo Corporation**