

# FINANCIAL WORKPLACE

NEW YORK **W**

# EXPLORE THE FUTURE FINANCIAL WORKPLACE

WELLS FARGO, 30 HUDSON YARDS, NEW YORK

TUESDAY FEBRUARY 27TH

09:00 - 17:00

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Samantha Cullum

Conference Producer,  
WORKTECH Events

## A warm welcome to Financial Workplace New York

Financial Workplace is the forum for all workplace professionals involved in the future of work and the workplace for the financial sector.

Never before has the workplace, and the way we work been so high on the agenda for organisations. As we make the great return to the office, how can business leaders in the financial services sector build engaging workplace experiences and cultures for their people?

You are invited to join 120+ senior professionals from real estate, facilities, HR, technology, executive management, architecture, design and professional advisors from some of the world's top financial institutions to listen to global thought leaders and share best practice and expertise.

The conference will be run in one stream, which means our delegates will get to attend every speaker presentation. We will also have a curated innovation exhibition happening in the breakout areas for attendees to meet with our education partners, complementing learning throughout the day, as well as three networking breaks, creating time for attendees to meet the other participants.

We hope you will be able to join us and we are looking forward to welcoming you to the event on February 27th.

Warmest regards,  
Samantha

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# MEET THE SPEAKERS



Financial Workplace New York will attract some of the biggest and brightest names to debate, discuss, and divulge the latest thinking on the future of work and the workplace.

The conference will feature leading international thinkers from industry and academia. Our speakers represent some of the world's biggest brands and best universities and research departments, alongside radical visionaries from new innovative organisations.

Through interdisciplinary speakers and learning experience, we focus on bringing cutting edge ideas and inspiration to the workplace community to enhance creativity and move thinking forward. Instead of focusing on peer to peer innovation through imitation, we aim to curate a unique programme, bringing together experts in the fields of people, place and technology and relevant adjacencies to reflect on the future of work and workplace.

Alongside the conference series, the WORKTECH Academy knowledge hub explores the future of work through six key themes: people, place, technology, design, culture and innovation. Creating leading commentary, research and publications that places scientific research at the heart of key business problems. [www.worktechacademy.com](http://www.worktechacademy.com)

## Full list of speakers

Jennifer Amankwa [TD Bank](#)  
Andrew Balster [Geniant](#)  
Ariel Bernstein [Accenture](#)  
Bob Cicero [Cisco](#)  
Adrian Cohn [Eptura](#)  
Alicia Duncan [BNY Mellon](#)  
Jessica Endert [Purple Digital Storytelling](#)  
Yasmien Fadl [TD Bank](#)  
Jaime Fuertes [Apollo Global Management](#)  
Autumn Gloetzner [Vista Equity Partners](#)  
Michelle Grove [Apollo Global Management](#)  
Joanna Hansen [Wells Fargo](#)  
Per Hansen [formerly Credit Suisse](#)  
David Henry [Wells Fargo](#)  
Jena Hwang [Morgan Stanley](#)  
Maya Ketter [OfficeSpace Software](#)  
Cindy Klein Roche [ezCater](#)  
Katrina Kostic Samen [Savills](#)  
David Martinson [Wells Fargo](#)  
Darius Miranda [Wells Fargo](#)  
Robert Morelli [HSBC](#)  
Aileen Murphy [Smarten Spaces](#)  
Tom Polucci [HOK](#)  
Philip Ross [UnWork](#)  
Sanjay Shamdasani [Geniant](#)  
Anthony Spagnollo [HOK](#)  
Nicole Turner [Mastercard](#)  
Sam Wood [Cisco](#)  
David Xides [Modo Labs](#)



**Joanna Hansen, Wells Fargo**



**Yasmien Fadl, TD Bank**



**Robert Morelli, HSBC**



**Nicole Turner, Mastercard**



**Ariel Bernstein, Accenture**



**Jena Hwang, Morgan Stanley**



**Jaime Fuertes, Apollo**



**Alicia Duncan, BNY Mellon**



**Darius Miranda, Wells Fargo**

# SESSION HIGHLIGHTS

The future of work and the workplace is on everyone's agenda. This event brings thought leaders together to share cutting edge ideas on the future, from both a people, place, and technology perspective. It will allow an understanding of the key drivers of change and enablers of innovation that will shape how, where and when work takes place.

Key themes we will be discussing at this event include:

## The Future Financial Workplace: Challenges & Emerging Trends

The pandemic has been a catalyst for re-shaping and re-thinking a new world of work. We examine what's on the horizon for the future of work in the financial services sector, looking at how business leaders should respond and what they should prioritize in the months ahead.

## Technology Enabled Workplace Experience

Companies are accelerating plans to invest in new technology, create flexible working environments and make the office a destination. We will examine the latest workplace technologies and innovations that will support workplace experience and the built environment for financial services in 2023 and beyond.

## People-Centered Spaces: Cultivating Culture & Engagement

How can companies make the office an attractive proposition to employees who now have more choice in where and how they work? We discuss the post pandemic impact on work, space, buildings and the effects on employee and company productivity, well-being, behavior, and culture.

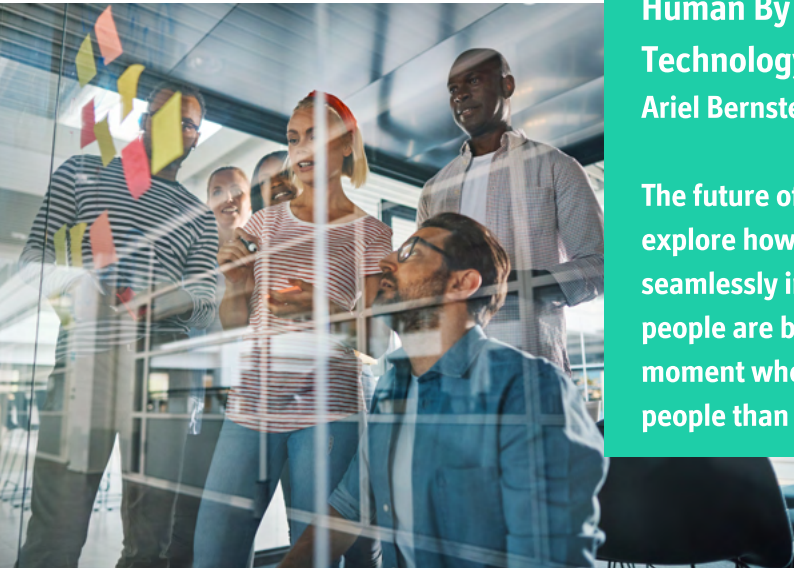
### KEY THEMES

THE FUTURE FINANCIAL  
WORKPLACE: CHALLENGES &  
EMERGING TRENDS

TECHNOLOGY ENABLED  
WORKPLACE EXPERIENCE

PEOPLE-CENTERED SPACES:  
CULTIVATING CULTURE &  
ENGAGEMENT





## Human By Design: Realizing the Potential of People and Technology

Ariel Bernstein, Lead Futurist, Accenture Technology Labs, Accenture

The future of technology is one that is human by design. This talk will explore how technology is becoming more natural, intuitive, and seamlessly integrated into our lives. From AI to Spatial computing, people are being amplified by the tools around them, as we experience a moment where advanced technology capabilities are available to more people than ever.

## Financial Workplace Innovations in the NYC Real Estate Landscape

Moderator: Philip Ross, Futurologist & CEO, Cordless Group & UnWork / Joanna Hansen, Global Head of Design and Standards, Corporate Properties Group, Wells Fargo / Jena Hwang, Global Co-Head of Real Estate and Location Strategy, Morgan Stanley

In this dynamic panel discussion, industry experts will spotlight active and newly completed financial services workplace projects in New York City, exploring key considerations for attracting top talent, crafting hospitality-driven workplace experiences and aligning workplace developments with sustainable and responsible business practices.



## A Conversation on the Evolution of the Financial Workplace

Jaime Fuertes, Managing Director, Global Head of Corporate Services, Apollo Global Management / Michelle Grove, Principal, Enterprise IT Services, Apollo Global Management / Anthony Spagnollo, Senior Principal, Practice Leader, HOK / Tom Polucci, Senior Principal, Firmwide Director of Interior Design, HOK

Join us as we share Apollo's journey from how they designed and delivered space pre-pandemic, throughout the lockdown, and into the coming years to ensure that they created the next great generation of workspaces and enhanced their culture in doing so.

## 08:30 | CONFERENCE OPENS

### 09:00 | CHAIRPERSON'S OPENING REMARKS

Katrina Kostic Samen, Vice Chair, Head of Savills Workplace Studio, Savills

Philip Ross, Futurologist & CEO, Cordless Group & UnWork



### 09:15 | HOST WELCOME ADDRESS

David Martinson, Global Head of Workplace Experience, Design and Construction Management, Corporate Properties Group, Wells Fargo



### 09:20 | HUMAN BY DESIGN: REALIZING THE POTENTIAL OF PEOPLE AND TECHNOLOGY

Ariel Bernstein, Lead Futurist, Accenture Technology Vision  
Accenture



The future of technology is one that is human by design. This talk will explore how technology is becoming more natural, intuitive, and seamlessly integrated into our lives. From AI to Spatial computing, people are being amplified by the tools around them, as we experience a moment where advanced technology capabilities are available to more people than ever.

### 09:45 | PURPOSE IN EVERY PIXEL: THE POWER OF DIGITAL STORYTELLING IN THE WORKPLACE

Darius Miranda, Strategy Consultant and Experience Architect, Corporate Properties Group, Wells Fargo / Jessica Endert, Head of Strategy, Purple Digital Storytelling



Storytelling is one of the most powerful tools a brand can wield. Stories allow us to build an emotional, human connection with our employees, customers and partners. Through the stories we tell in the workplace we can transform a space into a place of engagement. Digital experiences can help communicate meaning and nurture a sense of belonging while supporting business objectives. What's a place you're excited to walk into?

## 10:15 | NETWORKING & COFFEE BREAK

### 10:45 | EXPERT PANEL DISCUSSION: FINANCIAL WORKPLACE INNOVATIONS IN THE NYC REAL ESTATE LANDSCAPE

Moderator: Philip Ross, Futurologist & CEO, Cordless Group & UnWork / Joanna Hansen, Global Head of Design and Standards, Corporate Properties Group, Wells Fargo / Jena Hwang, Global Co-Head of Real Estate and Location Strategy, Morgan Stanley / Philip Pitruzzello, Managing Director, BlackRock

In this dynamic panel discussion, industry experts will spotlight active and newly completed financial services workplace projects in New York City, exploring key considerations for attracting top talent, crafting hospitality-driven workplace experiences and aligning workplace developments with sustainable and responsible business practices.



### 11:15 | TRANSFORMING THE WORKPLACE AND FACILITIES INTO A BUILDING ECOSYSTEM

Adrian Cohn, VP of Product Marketing, Eptura



We have new expectations for our workplace and real-estate. Sustainability, flexible environments, and tech-enabled facilities are all driving forces. Today's challenge is maximizing your real estate when the most reliable attribute of today's world is change. In this presentation, we'll explore trends from Eptura's Workplace Index, and map them back to strategies that enable you to make intelligent decisions that will impact your real estate portfolio for the next decade.



## WELLS FARGO, 30 HUDSON YARDS, NEW YORK

### 11:35 | SUPPLY & DEMAND STRATEGIES FOR YOUR TOP ASSETS: PEOPLE & PLACES

Maya Ketter, COO, OfficeSpace Software / Autumn Gloetzner, Director of Workplace Design & Construction, Vista Equity Partners



As financial organizations assess how to balance portfolio supply with employee demand for hybrid work, new data is fueling strategies to make the workplace a competitive advantage. Autumn Gloetzner, Director of Workplace Design & Construction for Vista Equity Partners, one of the Top 20 private equity firms in North America, and Maya Ketter, Chief Operating Officer at OfficeSpace, will introduce the 4 stages of the new Workplace Maturity Model, discuss the developmental objectives of each stage, explore a new cross-functional scorecard to track & boost hybrid success, and share cost-effective ways to use data & technology to drive strategic decisions that rebalance real estate supply with employee experience demand.

### 11:55 | AUDIENCE INTERACTIVE SESSION



### 12:00 | BANK CASE STUDY : SINGLE UNIFIED WORKPLACE SOLUTION

Aileen Murphy, Project Manager - USA & Europe, Smarten Spaces



### 12:05 | BOOK, BELONG, BUILD: CREATE A COLLABORATIVE AND CONNECTED COMMUNITY WITH A UNIFIED WORKPLACE EXPERIENCE APP

David Xides, Enterprise Accounts, Modo Labs



### 12:10 | FOOD: THE SECRET TO EMPLOYEE ENGAGEMENT

Cindy Klein Roche, VP of Brand and Corporate Marketing, ezCater



### 12:15 | NETWORKING & LUNCH BREAK

### 13:15 | BEYOND HYBRID WORK

Sam Wood, Americas Leader, Future Workplace and Sustainable Real Estate Practice, Cisco / Bob Cicero, Americas Hybrid Work Leader, Cisco



Beyond Hybrid Work: How is Cisco achieving industry leading talent retention, through a superior workplace experience, enabling health and wellness, achieving pre-pandemic return to office metrics and using its “divest to invest” real estate strategy to deliver on its net zero goals. Hear also from Bob Cicero, Cisco’s Americas Leader for Smart Workspace on some of the key challenges we have helped our customers solve with our approach.

### 13:35 | WORKPLACE PILOTS: NAVIGATING NEW METRICS & MEASUREMENTS OF SUCCESS

Moderator: Per Hansen, Former Global Head of Workplace Strategy, Credit Suisse / Robert Morelli, Head of Corporate Services USA, HSBC / Alicia Duncan, Global Head of Workspace Transformation, Technology Services Group, BNY Mellon / Nicole Turner, SVP of Global Technology Hubs, Mastercard / David Henry, Managing Director and Product General Manager of Workforce Experience and Productivity Solutions, Wells Fargo

Explore innovative approaches to creating and measuring flexible and adaptable workspaces and smart environments that enhance employee well-being, productivity, and engagement in this enlightening and dynamic discussion. The panel's focus will be on sharing priorities, introducing pilots, and highlighting the wins, the surprises, and the learnings so far.



### 14:05 | A CONVERSATION ON THE EVOLUTION OF THE FINANCIAL WORKPLACE

Jaime Fuertes, Managing Director, Global Head of Corporate Services, Apollo Global Management / Michelle Grove, Principal, Enterprise IT Services, Apollo Global Management / Anthony Spagnollo, Senior Principal, Practice Leader, HOK / Tom Polucci, Senior Principal, Firmwide Director of Interior Design, HOK

The pandemic has changed the way we live, work and interact. Organizations that do not recognize the shifts that are occurring, could become irrelevant. While the world was on hold, organizations like Apollo had to morph to accommodate the needs of their workforce and manage millions of SF of space. While doing so, a new social dynamic emerged. Join us as we share Apollo’s journey from how they designed and delivered space pre-pandemic, throughout the lockdown, and into the coming years to ensure that they created the next great generation of workspaces and enhanced their culture in doing so.



## WELLS FARGO, 30 HUDSON YARDS, NEW YORK

### 14:30 | A DEEP DIVE INTO TD BANK'S INTERCONNECTED DIVERSITY, INCLUSION AND EQUITY STRATEGY

Yasmien Fadl, **AVP, Head of Workplace Design & Experience, TD Bank** / Jennifer Amankwa, **Diversity & Inclusion Partner, TD Bank**



This session offers a deep dive into TD Bank's Interconnected Diversity, Inclusion and Equity Strategy. Yasmien and Jennifer offer a comprehensive overview of how this strategy manifests at TD through their built environments, experience strategies (i.e. digital and physical), and talent strategies – reflecting on the challenges, successes and opportunities.

### 15:00 | NETWORKING & COFFEE BREAK

### 15:30 | THINK TANK BREAKOUT DISCUSSIONS

Join our interactive think tank discussion groups, where we explore the future of work's most compelling topics. Alongside, keynote presentations and expert panel discussions from industry experts, we are excited to be introducing a new think tank session into our program.



#### MAGNETIZING THE BUILT ENVIRONMENT WITH THE POWER OF DIGITAL STORYTELLING

As business leaders strive to instil purpose and meaning within their physical workplaces, how can the power of digital storytelling be leveraged to seamlessly merge the physical and digital realms and magnetize people to the office? What tools and strategies can be used to reinvigorate physical spaces and transform them into places of engagement and meaningful collaboration?



#### TALENT OF THE FUTURE AND THE NEW EMPLOYEE VALUE PROP

Let's delve into strategies for attracting, retaining, and harnessing the potential of tomorrow's workforce. What innovative approaches can be leveraged to enhance culture and bridge organizational needs with the aspirations of the next generation of employees?



#### DIGITAL TRANSFORMATION: THRIVING IN THE MODERN WORKPLACE

As the pace of technological advancements accelerates, we explore digital transformation and share lessons learned in navigating the modern workplace's digital terrain. When thinking about how you are leveraging workplace data alongside emerging disruptors like AI and spatial computing within your organizations, how can you create seamless experiences to thrive in the digital era?

### 16:20 | DESIGN BY HUMANS: PRACTICE AT THE INTERSECTION OF SPACE AND TECHNOLOGY

Sanjay Shamdasani, **Managing Director & Co-founder, Geniant** / Andrew Balster, **President, Physical Space Practice, Geniant**



In this closing session, Sanjay Shamdasani (UX) and Andrew Balster (Architecture), partners at geniant, discuss design at the confluence of digital and physical space. Sanjay and Andrew are currently delivering solutions to large financial services firms to re-imagine the employee experience for hybrid work in a fluid way across physical environments and technology-enabled moments. Addressing some of the key topics and challenges discussed throughout the day, they will provide examples illustrating how to leverage UX-style research in the architectural design process, and how articulating a spatial vision from a user's standpoint is a compelling strategy for captivating leadership teams.

### 16:45 | CHAIRPERSON'S CLOSING REMARKS

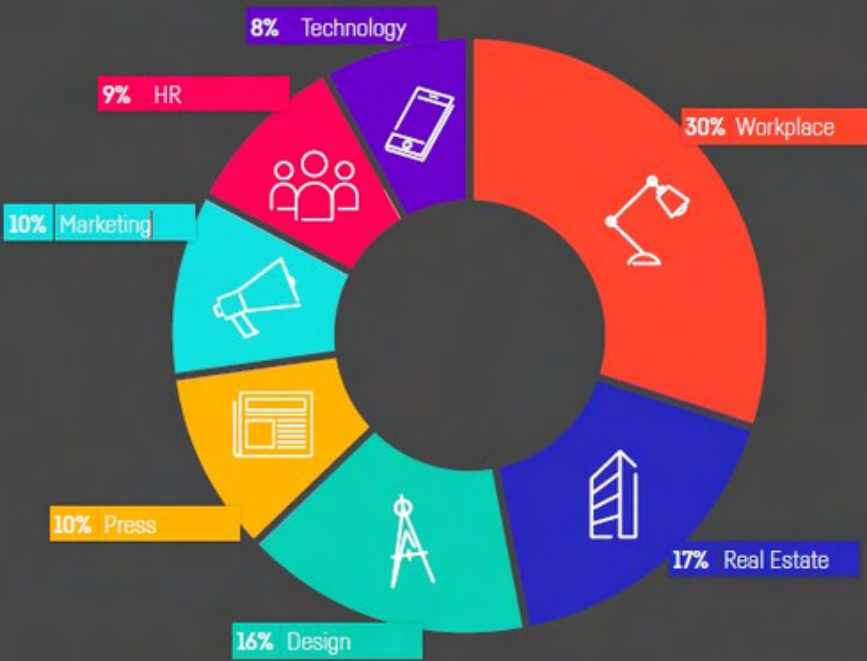
Katrina Kostic Samen, **Vice Chair, Head of Savills Workplace Studio, Savills**

Philip Ross, **Futurologist & CEO, Cordless Group & UnWork**



### 17:00 | CONFERENCE CLOSES

# WHO ATTENDS



A well-spoken and experienced group of presenters providing leading edge subjects current topics and statistics. A great place to learn about new ideas.

WORKTECH DELEGATE, DELOITTE



Informative, interesting views on workplace design, planning technology and workers

WORKTECH DELEGATE, BANK OF MONTREAL



# BOOK NOW

[www.worktechevents.com/events/worktech24-financial-workplace-new-york/](http://www.worktechevents.com/events/worktech24-financial-workplace-new-york/)

## KEY INFORMATION

**When:** Tuesday, February 27th 2024

**Where:** Wells Fargo, 30 Hudson Yards, New York

### **How to book:**

**Visit:** [www.worktechevents.com/events/worktech24-financial-workplace-new-york/](http://www.worktechevents.com/events/worktech24-financial-workplace-new-york/)

### **Offer a Special Rate to Your Network!**

Become a marketing partner for this event and qualify for a special rate for your colleagues, complimentary passes for yourself, logo exposure for your organisation, and more!

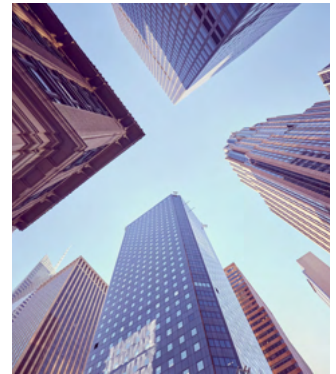
If you are part of a group that would like to attend and are looking for a joint group rate please get in touch to arrange a bespoke ticket price.

### **Become a WORKTECH Ambassador**

We're looking for people that love the future of work and the workplace and social media. People who are willing to become part of our team and help spread the word to the masses. There will be a free event ticket available to successful applicants.

For more information on the above initiatives, please contact:

[kirsty.darlington@worktechevents.co.uk](mailto:kirsty.darlington@worktechevents.co.uk)



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