



LEADERSHIP.  
ADVOCACY.  
EDUCATION.

## 2019 LSTA OPERATIONS CONFERENCE ISSUE SPOTTING, PROBLEM SOLVING: THE PATH FORWARD

8:00AM–9:00AM

**REGISTRATION/BREAKFAST**

9:00AM–9:30AM

**FIRESIDE CHAT: WHAT KEEPS YOU UP AT NIGHT?  
WHAT GETS YOU UP IN THE MORNING?**

MODERATOR

**Lee Shaiman**, Executive Director, LSTA

SPEAKERS

**John Gally**, MD & Head of North American Leveraged Finance Sales & Trading, Morgan Stanley

**David Golub**, President, Golub Capital

**Claudette Kraus**, MD, CIFIC Asset Management

9:30AM–10:15AM

**TRADING THROUGH THE VOLATILITY**

*A look at the cause and effect of higher volatility in the secondary market and the impacts on the primary.*

MODERATOR

**Ted Basta**, EVP of Analytics & Strategy, LSTA

SPEAKERS

**Maegan Gallagher**, Head of Trading & Capital Markets, Octagon Credit Investors

**Neha Khoda**, Director, Credit Strategy, BAML

**David J Mechlin**, Director, Credit Suisse Asset Management

**Steve Miller**, MD, Fitch Solutions LevFin

10:15AM–10:45AM

**TICK TOCK! THE END OF LIBOR...AND HOW IT AFFECTS YOU**

*What operations professionals must know about LIBOR cessation, triggers, fallbacks and SOFR strategies.*

**Meredith Coffey**, EVP of Research & Regulation, LSTA

10:45AM–11:15AM

**MORNING BREAK**

11:15AM–12:00PM

**PREPARE, DON'T PANIC FOR THE MOVE AWAY FROM LIBOR!**

*How to Operationalize the LIBOR Transition to SOFR.*

MODERATOR

**Ellen Hefferan**, EVP of Operations & Accounting, LSTA

SPEAKERS

**John Drummey**, Vice President, State Street Global Services

**Nina Guinchard**, Director, Head of the Transaction Coordination Group, Deutsche Bank

**Paul Marchetti**, Senior Principal Product Manager, Finastra

**David Watson**, MD, Wholesale Lending Services - Commercial Banking, JPMorgan Chase



LEADERSHIP.  
ADVOCACY.  
EDUCATION.

**12:00PM–12:30PM**

**DATA & BEHAVIOR: HOW SHOULD WE STRUCTURE OUR DATA & CHANGE OUR PROCESS TO SUPPORT A DIGITIZED WORLD?**

*Standardizing Documentation, Data and Workflow to lower the barrier to automate and integrate.*

MODERATOR

**John Olesky**, MD, Financial Services, IHS Markit

SPEAKERS

**Cynthia Murray**, MD, Head of Loan, Leasing and Trade Operations, BAML

**Sandra Stulberger**, Director, BlackRock

**Gwen Zirkle**, Director, Loan Administration Services, BNY Mellon

**12:30PM–1:45PM**

**LUNCH**

**1:45PM–2:30PM**

**PRIMARY DELAYED COMPENSATION PROTOCOL: WILL YOU AND YOUR INSTITUTION BE READY?**

*Discussion of legal, operational and technology changes required for implementation.*

MODERATOR

**Ellen Hefferan**, EVP of Operations & Accounting, LSTA

SPEAKERS

**Julia Kingsbury**, MD, Global Head of Credit Operations, Credit Suisse

**Christine Scaffidi**, Senior Principal Product Manager, Finastra

**Sarah Wagner**, MD, Financial Services, IHS Markit

**Paul Weinberger**, Vice President – Treasury Manager, Voya Investment Management

**2:30PM–3:10PM**

**KNOW YOUR CUSTOMER – PREFERABLY BEFORE THE READY DATE!**

*What/Who must be identified? Why? Regulatory, Operational, Tax and Compliance perspectives are provided. How can this information be managed and tracked to maximize efficiency?*

MODERATOR

**Bernadette Conway**, Chief Operating Officer/Chief Credit Officer, Elmwood Asset Management

SPEAKERS

**Michael Eliason**, Vice President, Citi Global Loans, Citigroup

**Kathleen Jeszeck**, Associate, Oak Hill Advisors

**Jeanine McGuinness**, Counsel, Davis Polk & Wardwell LLP

**Phillip Waldier**, Vice President, Wells Fargo

**3:10PM–3:30PM**

**AFTERNOON BREAK**

**3:30PM–4:15PM**

**KEYNOTE SPEAKER: PAUL ZIKOPOULOS, VP OF BIG DATA COGNITIVE SYSTEMS AT IBM**

*Paul will offer a framework for excelling in a time of rapid change as big data, AI, data science and machine learning provide financial institutions with not only a competitive edge, but ultimately a survival tool. How to capitalize on this innovation will be explored.*



LEADERSHIP.  
ADVOCACY.  
EDUCATION.

**4:15PM–5:00PM**

**LOOKING AHEAD 5 YEARS: DRILLING DOWN TO TECHNOLOGY INNOVATION FOR THE LOAN MARKET PERSPECTIVE**

*What are the transformative benefits that innovative technology will bring? Where should you invest your technology dollars to gain these benefits? What are the barriers and solutions for settlement optimization and system integration?*

MODERATOR

**Steve Shyn**, MD, Accenture

SPEAKERS

**Karen Buzard**, Senior Counsel – US Know How, Allen & Overy, LLP

**Alex Margolin**, Head of Syndication Technology & Automation, Wells Fargo

**Paul Zikopoulos**, VP of Big Data Cognitive Systems, IBM

**5:00PM–7:00PM**

**COCKTAIL RECEPTION**