

POWER USERS CONFERENCE 2025

AGENDA

Wednesday, July 16

4:00 – **Registration**
6:30 p.m. Lobby, Northern Trust, 50 S. LaSalle St.

4:30 p.m. **Optional: Wealth Passport Feature Overview**
Global Conference Center, Miami Room, 1st Floor

If you are a new family office employee and/or user of Wealth Passport, join us for an optional “refresher” session where we will walk through Wealth Passport’s key features, recent enhancements and common use cases.

5:30 – **Power Users Welcome Reception**
7:30 p.m. Assembly Room, 6th Floor

Plan to join your family office power user peers and Northern Trust leadership teams for an evening of reconnecting and networking over cocktails, hors d’oeuvres and live music. You will have the opportunity to visit a number of booths profiling various technology solutions available to you and your family office.

Thursday, July 17

7:30 – **Registration**
8:30 a.m. Lobby, Northern Trust, 50 S. LaSalle St.

8:00 a.m. **Breakfast**
Assembly Room, 6th Floor

8:30 a.m. **Welcome & Opening Remarks**

Vijay Luthra, Chief Information Officer, Wealth Management & Asset Management, Northern Trust
Dino De Vita, President, Global Family & Private Investment Offices, Northern Trust



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Thursday, July 17 (*continued*)

8:45 a.m. **Keynote: The AI Horizon – Where We Are, Where We’re Going**

AI is top of mind for many, inspiring a range of emotions along with untold implications and applications. This presentation will walk us through AI’s capabilities today and what the future may hold, along with how to think about exploring and integrating AI into your day-to-day life.

Dan Kraemer, Co-Founder and Co-CEO, IA Collaborative

9:30 a.m. **Networking Break & Technology Booths**

10:00 a.m. **GFO Technology: Looking Back & Looking Forward**

Our product leaders will share the progress we have made since the 2024 Power Users Conference, along with exciting updates for our new reporting capability, Anchor Intelligence.

Brian Crouch, GFO Technology Product Manager, Northern Trust
Stella Mancusi, GFO Technology Product Manager, Northern Trust

10:30 a.m. **Introductory Breakout Sessions**

Global Conference Center, 1st Floor

Our morning breakout sessions will provide attendees the ability to learn more about various product capabilities, new features, and ways to orient yourself to ensure you are equipped to make the most of our tools in the course of your day-to-day responsibilities.

Invitees are welcome to participate in two breakout sessions based on selections at the time of registration. Each breakout session will last for 45 minutes.

1. **Getting Started with Anchor Intelligence:** Our new reporting capability, learn what it can do and how you can leverage Anchor Intelligence when evaluating your family’s or family office’s reporting.
2. **Optimizing Productivity:** Explore ways to digitally streamline your daily operations.
3. **Getting Started with Account Opening:** We will walk you through new processes, capabilities, and functionality designed to make the Account Opening process more seamless and efficient.
4. **Getting Started with Enrollments:** Learn all about our new enrollment features. In this session, we will go over the new digital processes that allow you to add users, manage account permissions and more, directly from Wealth Passport.

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Thursday, July 17 (*continued*)

12:00 p.m. **Lunch, Networking, & Technology Booths**

Assembly Room, 6th Floor

1:45 p.m. **Forward-Looking Breakout Sessions**

Global Conference Center, 1st Floor

Help shape what comes next. In each session you'll collaborate directly with our Product and Design teams to share what's working, where we can improve and what you'd like to see added. Each session will focus on a key area of the application, giving you an opportunity to influence our roadmap and help us prioritize what matters most to you.

Invitees are welcome to participate in two breakout sessions based on selections at the time of registration. Each breakout session will last for 45 minutes.

1. **Anchor Intelligence for Advanced Users:** This iterative breakout session is designed to do a deep-dive on the tool and give real-time feedback while learning what's possible within Anchor Intelligence using advanced features and concepts.
 2. **Dashboards:** The ability to start each day with a real-time understanding of the status of various workflows and activities is imperative. Walk us through how you like to receive information and help us develop the next version of dashboards designed to meet your needs.
 3. **Administrative Functions:** For those of you who manage user access, permissions and usage, this breakout session will give you the ability to share feedback on how we have designed these tools and what we can do to improve information and data quality as well as workflows when you are making changes.
 4. **Portfolio Insights & Data Management:** This session will explore ways to optimize how you search, filter and view your portfolio data. Whether you are drilling down to the tax lot in Portfolio Explorer, fine-tuning your top-level views in Net Worth Summary, or simply looking to answer a one-off request, this session is for you.
 5. **Money Movement:** Designed for originators and approvers, attendees will see a sneak peek of upcoming enhancements, provide general feedback and take part in activities to uncover future enhancements.
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3:30 p.m. **Cybersecurity & Protecting Your Family Office**

Assembly Room, 6th Floor

Hear from a leading consulting firm as we explore the latest trends in cyber crime, as well as takeaways that you can use to combat cyber threats in the future.

Mike Coleman, Senior Vice President, Client Risk Mitigation, 360 Privacy
Chris Wingfield, Senior Vice President, Strategic Innovation, 360 Privacy

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Thursday, July 17 (*continued*)

4:15 p.m. **What's Next & Closing Remarks**

Stella Mancusi, GFO Technology Product Manager, Northern Trust

4:30 – **Optional – Time with your product team or Digital Solutions Consultant**

5:30 p.m.

Sign-up at registration

GFO Technology Featured at Booths Include:

Wealth Passport | Anchor Analytics | Accounting Tools
Total Portfolio Solutions | Digital Collaboration Hub | Account Opening
Transactions | Enrollments