



## Chicago Members Meeting Agenda

**Location:**

Hotel Chicago  
333 N. Dearborn  
Chicago, IL 60654

**AUG Facilitators:**

Jennifer Litchfield, Executive Director  
(757) 373 - 2454

Monday May 21, 2018	
9:30 am – 10:00 am	Registration, Coffee & Visit with Sponsors in <i>The Exchange</i>
10:00 am – 10:15 am	Welcome & Introductions –
10:15 am – 11:00 pm	<b>Best Practices for Replacing Legacy Software</b> Firms perceive replacing legacy software as a huge headache and no one wants to be responsible for a failed endeavor. Sue will address your fears of replacing legacy software, discuss how to develop a successful migration plan, and provide guidance if your current migration process is a disappointment.
11:00 am – 11:15 am	Break in <i>The Exchange</i> with Sponsor Exhibitors
11:15 am – 12:15 pm	<b>Breakout Roundtable Session #1 – (Assigned Break-Outs Rooms)</b> Join your peers for valuable product specific discussions (Compliance, Ops – Back Office, or Peer-to-Peer).
12:15 pm – 1:15 pm	Lunch in - Sponsor Exhibit Viewing in <i>The Exchange</i> Thank you to our sponsors!
1:15 pm – 2:30 pm	<b>Breakout Roundtable Session #2 – (Assigned Break-Outs Rooms)</b> Join your peers for valuable firm related specific discussions (IT/Cybersecurity, Ops – Strategic Planning, or Trading/Reporting).
2:30 pm – 2:45 pm	Break in <i>The Exchange</i> with Sponsor Exhibitors
2:45 pm – 3:45 pm	<b>Cybersecurity Trends – 2018 and beyond</b> In this session, we will dig into the changing threats facing our IT, information security and risk teams. We will look at why organizations are failing at such a high rate and what we can do to improve our people, process and technology programs to combat the sophisticated threats that our organizations face today. The threats and the threat actors have evolved, we will discuss strategies and tactics to get ahead.
3:45 pm – 4:00 pm	AUG Update and Meeting Wrap-Up – Alembic
4:00 pm – 6:00 pm	Networking Reception

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# the exchange

## GUEST SPEAKERS

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**Sue Glover**, President of Susan Glover & Associates, brings over 30 years of operations and technology management experience to the RIA and wealth management community. As an independent consultant, without vendor allegiances, her focus is on the best structure and technology for her clients.

**Mike Lipinski**, Mike is a Principal in the Cybersecurity practice at Plante Moran. Mike has spent 29 years in information technology, 20 plus of those focused on information security and risk. Mike has hands on experience building, managing and maturing IT, information security, risk, governance, business continuity and privacy programs in his roles as CIO, CTO, and CISO. Mike has also worked with numerous clients across industries such as financial services, insurance, healthcare, pharma, automotive, manufacturing, government, aviation and energy to assess, design, build run and develop risk, IT governance, and information security programs. Mike is a frequent speaker at industry conferences and trade events and is published regularly in white papers, blogs, news and magazines.

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