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AUGUST 12, 2026 | CHICAGO, IL

AI in Finance Summit Chicago



DoubleTree Magnificent Mile

REGISTER NOW

Shape the Future of Finance with AI in Chicago

Join Chicago's top financial innovators and AI visionaries, gain exclusive insights, and shape the next era of finance

Connect with industry leaders, innovators, and AI experts at a one-of-a-kind summit where ideas turn into action. Explore cutting-edge applications of AI in finance, discover strategies driving efficiency and growth, and connect with the minds redefining the industry.

This is your chance to be part of the conversation, gain practical insights, and leave inspired to transform your organization with AI. **Don't just follow the revolution, be at the forefront of it.**

WHAT'S NEW FOR 2026?

- **Explore the AI and ML innovations shaping finance**, from autonomous decision-making to real-time risk and fraud management.
- **Connect with New York's top financial and AI leaders** and a global network of executives driving industry transformation.
- **Gain actionable insights from experts and real-world use cases**, enabling your organization to implement AI strategies that accelerate growth and efficiency.
- **Future-proof your business with AI-driven strategies** and stay ahead in a rapidly evolving financial landscape.

AI in Finance Summit Chicago 2026 Key Themes:

- **THE NEXT FRONTIER OF AI IN FINANCE** – From agentic AI and multi-agent systems to quantum breakthroughs reshaping trading, risk, and compliance.
- **TRUST, REGULATION & RESPONSIBLE AI** – Building transparency, fairness, and auditability while navigating evolving global regulatory frameworks.
- **DRIVING BUSINESS VALUE & ROI** – Moving beyond pilots to enterprise-wide adoption, delivering measurable outcomes in efficiency, revenue, and customer experience.
- **AI FOR SUSTAINABLE & INCLUSIVE FINANCE** – Leveraging AI for ESG, climate risk, and expanding financial access in emerging markets.

Speakers Confirmed:

- Kelly Marie O'Brien, *Vice President, Innovation Economy Card*, JPMORGANCHASE
- Alan Zhang, *SVP Credit Analytics & Infrastructure*, FIRST CITIZENS BANK
- Shuen Mei, *VP, Director of Software and Data Engineering*, HARBOR CAPITAL
- Joseph Chen, *SVP – Financial Modeling (QMA)*, WINTRUST FINANCIAL CORPORATION
- Dian Xu, *VP of Engineering in Data*, NEW AMERICAN FUNDING
- Hunter Treschl, *Manager, AI Center of Excellence*, CBOE GLOBAL MARKETS
- Vishal Sai Gadige, *Senior Manager - Data Science and Reporting*, CIBC US
- Karthikcharan Suresh, *Sr. Lead Data & AI*, HIGHSTREET INSURANCE PARTNERS
- Kishan Kumar, *Senior Software Engineer - Data and AI*, CHIME
- Harkirat Kaur, *Quantitative Research-Vice President*, JPMORGANCHASE
- Goutham Miryala, *Sr. Data Engineer*, CHIME
- Raghuvaran Reddy Kalluri, *Lead Developer & Solution Architect*, ROYAL BANK OF CANADA
- Will Johnson, *Head of Data Engineering and Development*, CERITY PARTNERS
- Jesse Gossett, *Senior Director, Examinations*, FINRA
- Priya Suvvaru, *Director of Technology*, CLIFFWATER
- Anjan Bhattacharya, *Director - Cleared Derivatives and Collateral Technology*, BANK OF AMERICA
- Jubinder Singh, *Senior Manager, Corporate Strategy AI*, CHARLES SCHWAB
- Anurag Sachdev, *Head of Data & AI*, MAY RIVER CAPITAL
- Lanier Pegues, *Director of Sales*, NiCE Cognigy
- Matthew Phoenix, *Head Americas - Financial Services*, IMPETUS

AI in Finance Chicago | AGENDA DAY ONE August 12, 2026 Chicago

7:50am – 8:40 am	Registration & Open Networking in the Exhibition Area
08:40am-9:00am	WELCOME NOTE & OPENING REMARKS: Priya Suvvaru, <i>Director of Technology</i> , CLIFFWATER
9:00am - 9:30am	Keynote Presentation: AI in Private Equity: Building Intelligence into the Industrial Lower Middle Market • Why PE firms have a structural AI advantage that most haven't yet operationalized, and how the constraints of smaller portfolio companies force a more pragmatic, outcome-first approach to AI deployment • From raw portfolio data to decision intelligence: building an AI layer across a portfolio without enterprise-scale resources or a dedicated data engineering team • Measuring AI ROI in a PE context: how to connect AI investment to hold period value creation, not just internal efficiency Anurag Sachdev, <i>Head of Data & AI</i> , MAY RIVER CAPITAL
9:30am – 10:00am	Keynote Presentation: The Agentic Operating Layer for CX: Future-Proofing Financial Services Beyond the Chatbot Enterprise conversational AI has moved through three eras: rule-based NLU that worked but couldn't scale, the generative leap that changed what was possible overnight, and now the agentic shift, where AI doesn't just understand the customer, it decides and acts. In financial services, the window to lead that shift instead of reacting to it is closing fast. In this session, Lanier Pegues (NiCE Cognigy) traces that evolution and unpacks what it takes to move from conversation-driven applications to a governed, agentic operating layer that's built to last.

	• Why this moment is a platform shift, not an upgrade cycle — and what “future-proofed” requires in a regulated, telephony-first environment • The disintermediation risk most finance leaders are underwriting by accident: what happens when your customer’s AI agent replaces their browser session • Moving from point solutions to orchestration — coordinating AI agents, human agents, and backend systems on a single data foundation • Governance as the enterprise gate: not AI unleashed, but AI that’s supervised, accountable, and audit-ready — the difference between a pilot and a deployment Lanier Pegues, <i>Director of Sales, NiCE Cognigy</i>
10:00am – 10:30am	Keynote Presentation: Beyond the Chatbot: Parallelizing Agents for Speed and Scale A single AI agent tackling a complex workflow hits the same bottleneck as a single engineer owning an entire system- it's slow, fragile, and doesn't scale. This talk makes the case for multi-agent architectures where specialized agents run in parallel, each owning a discrete subtask, coordinated by an orchestration layer. We'll cover how to decompose workflows into parallelizable units, manage inter-agent communication and dependencies, and handle failures gracefully. Harkirat Kaur, Quantitative Research-Vice President JPMORGAN CHASE
10:30am – 11:00am	<i>Mid-Morning Coffee Break & Networking in Exhibition Area</i>
11:00 am - 11:40am	Panel Discussion: Building and Scaling AI: From Generative AI to AI Agents – Balancing Cost, Risk, and Business Value • What are the most effective strategies to scale AI initiatives while keeping costs under control? • How can organizations balance the transformative potential of generative AI with the risks it introduces? • In what ways AI Agents are reshaping business operations, and what challenges come with their adoption? • How do you measure and ensure tangible business value from AI investments across the enterprise? Panelists: Hunter Treschl, <i>Manager, AI Center of Excellence, CBOE GLOBAL MARKETS</i> Karthikcharan Suresh, <i>Sr. Lead Data & AI, HIGHSTREET INSURANCE PARTNERS</i> Kishan Kumar, <i>Senior Software Engineer - Data and AI, CHIME</i> Kelly Marie O'Brien, <i>Vice President, Innovation Economy Card, JPMORGANCHASE</i> Moderator: Matthew Phoenix, <i>Head Americas - Financial Services, IMPETUS</i>
11:40am- 12:10pm	Keynote Presentation: From Data to Strategy: Transforming Investment Processes with a Self-Correcting Multi-Agent Framework • Traditional LLMs Are Not Production-Ready for Regulated Investment Workflows • Harbor's Multi-Agent AVR Framework Delivers Institutional-Grade Reliability • Validation-Centric AI Is Essential for Scalable Adoption Shuen Mei, <i>VP, Director of Software and Data Engineering, HARBOR CAPITAL</i>
12:10pm - 1:00pm	Panel Discussion: Trusted Customer Data as the Catalyst for AI Innovation • How can financial institutions ensure the quality, integrity, and governance of customer data to drive reliable AI outcomes? • In what ways does trusted customer data accelerate the development of innovative, personalized financial products and services?

	What are the biggest challenges in balancing customer privacy with the need for data to fuel AI innovation? Panelists: Alan Zhang, <i>SVP Credit Analytics & Infrastructure</i>, FIRST CITIZENS BANK Goutham Miryala, <i>Sr. Data Engineer</i>, CHIME Will Johnson, <i>Head of Data Engineering and Development</i>, CERITY PARTNERS Jubinder Singh, <i>Senior Manager, Corporate Strategy AI</i>, CHARLES SCHWAB Moderator: Dian Xu, <i>VP of Engineering in Data</i>, NEW AMERICAN FUNDING
1:00pm – 2:00pm	<i>Lunch & Networking in Exhibition Area</i>
2:00pm – 2:30pm	Keynote Presentation: Perspective on AI, Governance, Compliance, and Innovation within Financial Service Balancing AI innovation with governance and regulatory requirements Building responsible AI frameworks that support business growth Managing compliance, risk, and trust in AI-driven financial services Jesse Gossett, <i>Senior Director, Examinations</i>, FINRA
2:30pm-3:00pm	Keynote Presentation: The Human Glue in AI: How Soft Skills Drive Impact in Financial Services - Bridging the gap between data teams and business leadership - Enabling scalable AI through cross-functional collaboration - Using emotional intelligence to lead change and foster adoption - Positioning soft skills as a strategic advantage in AI-driven initiatives Dian Xu, <i>VP of Engineering in Data</i>, NEW AMERICAN FUNDING
3:00pm-03:30pm	Keynote Presentation: The Rise of Autonomous Finance: From Models to Decision-Making Systems - How AI is evolving from prediction to execution (AI agents in trading, risk, and operations) - What “agentic AI” means for banks, hedge funds, and fintechs - The future role of humans in AI-driven financial decisions Joseph Chen, <i>SVP – Financial Modeling (QMA)</i>, WINTRUST FINANCIAL CORPORATION
3:30pm – 4:00pm	<i>Afternoon Coffee Break & Networking in Exhibition Area</i>
4:00pm-4:30pm	Keynote Presentation: Agentic (AI) Master Data Management - Transforming MDM with autonomous AI agents - Improving data quality and governance through intelligent automation - Enabling trusted, scalable AI with unified enterprise data Raghuvaran Reddy Kalluri, <i>Lead Developer & Solution Architect</i>, ROYAL BANK OF CANADA
4:30pm – 5:00pm	Keynote Presentation: Semantic Models Are Infrastructure: Powering Reliable AI at Scale - Why today’s semantic layer is breaking and silently corrupting both analytics and AI - How we built a deterministic, versioned semantic control plane (no LLM guesswork) - Turning semantics into infrastructure that powers both BI and GenAI consistently Kishan Kumar, <i>Senior Software Engineer - Data and AI</i>, CHIME
5:00pm-5:30pm	Keynote Presentation: Building Trust in AI - Why Data Quality & Governance Matter Most in Finance How does poor data quality directly undermine AI outcomes in finance?

	• What governance practices truly build trust in AI-driven decisions? • How can institutions balance innovation with strict data controls? • What lessons from early adopters show the ROI of strong data governance? Vishal Sai Gadige, <i>Senior Manager - Data Science and Reporting</i> CIBC US
5:30pm-6:30pm	<i>Networking Reception in the Exhibition Area</i>
6:30pm	<i>End of Day 1</i>