



# 2026 DISTRIBUTION AND MARKETING CONFERENCE

*Agility in Action*

**Tech-Driven Growth:  
Leveraging Innovation to  
Accelerate Annuity Sales**





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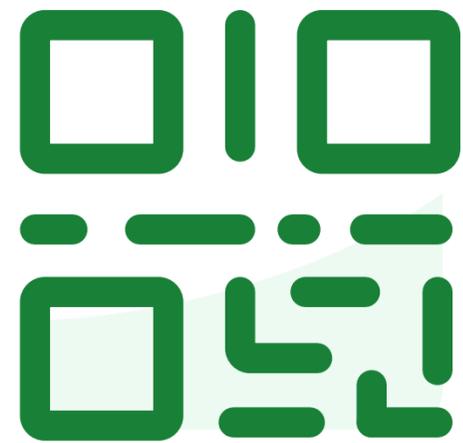
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TIFIN AMP

# It's Loud Out There



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# AI State of the Industry



**Where are you on your AI journey?**

# Advisor and Client Impact





**If you could launch one AI solution to improve your business, what would you prioritize?**



**Has your firm begun to use any types of AI for distribution insights?**

# Education and Training



# Budgeting and Resources





**What type of AI governance policy exists at your firm?**



**Which type of data do your sales teams use the most?**

# Managing Risks





**What are the most important success measurements for your AI Initiatives?**

# Adoption Mistakes and Best Practices





**Over the past 12 months, what percent of your AI pilots have moved into full scale production?**

# Unintended Consequences





## **Audience Q&A**



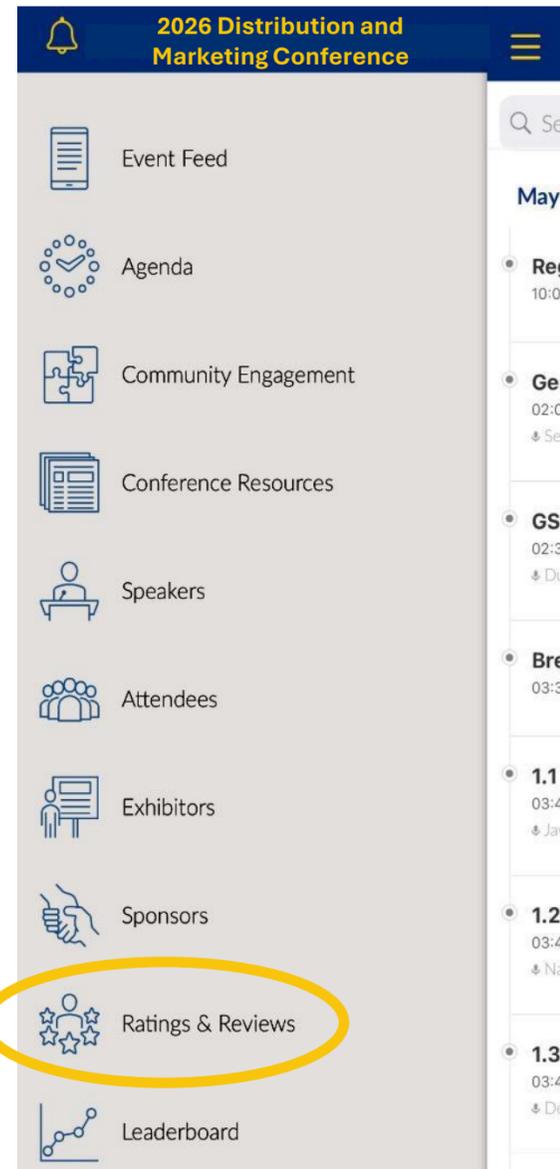
# Key Takeaways

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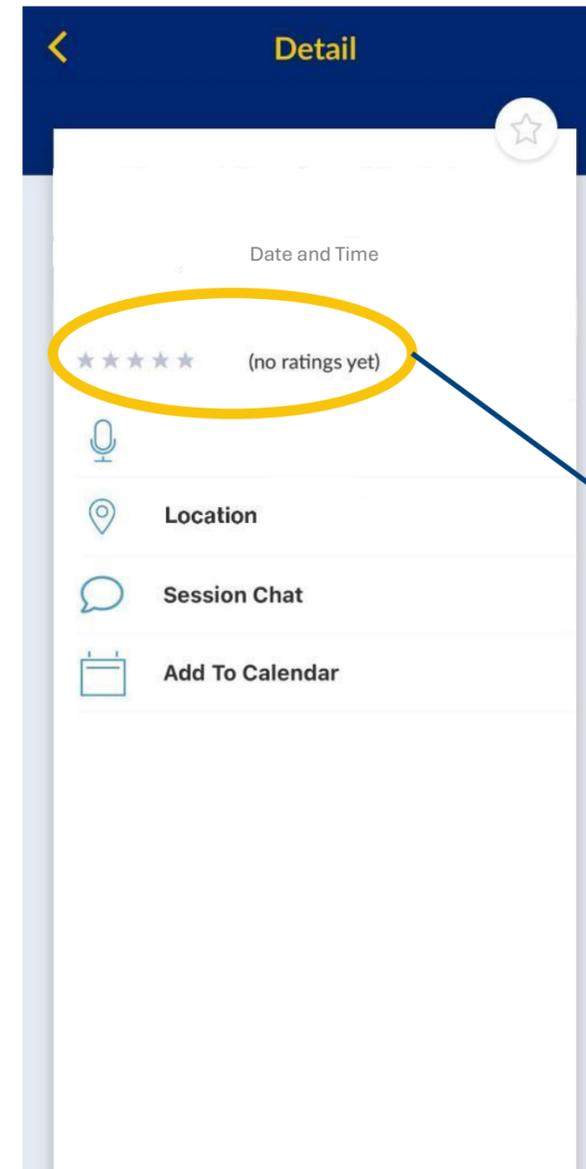
<b>M</b>	<b>O</b>	<b>R</b>	<b>E</b>
Develop a business <b>MODEL</b> to govern AI use and impact	<b>ORGANIZE</b> data needed to drive results	<b>RANK</b> and prioritize use cases with most impact	<b>EXPERIMENT</b> refine outcomes as models learn
<b>MEASURE</b> results based on AI model learnings	<b>OVERSEE</b> the data chain of custody for effective governance	<b>RESOURCES</b> to marry the art of adoption with the science of AI	<b>EXPAND</b> by using cohorts after successful pilots to scale across your firm

# We Value Your Feedback - Share It in the Conference App.

## Module Option



## Agenda Option



# Thank You



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*Navigate With Confidence*

