DATA+AI SUMMIT

BY databricks

Financial Services Guide to Data + AI Summit

SAN FRANCISCO, JUNE 26-29, 2023

AI Powered and Data Forward in Financial Services

Welcome!

You're invited to open your world to the new innovations at Data + AI Summit 2023. It's great to be back at the Moscone Center at our biggest event to date. This year's conference is packed with best practices, usable examples, hands-on demos and customer stories to help you make the most of the Databricks Lakehouse for Financial Services so you can achieve your business goals.

We are thrilled to announce that Larry Feinsmith, Head of Global Tech Strategy, Innovation and Partnerships at JPMorgan Chase, along with Satya Nadella, CEO of Microsoft, and Eric Schmidt, former CEO of Google, will be our esteemed keynote speakers at Summit. Their presentations will focus on the latest innovations, impact and future of AI, ML and large language models (LLMs).

Discover how Lakehouse for Financial Services can bring data and people together for every financial institution. To continue the momentum of gathering all your data, analytics and AI on one platform, our goal is to help you on your journey to data and AI-driven innovation.

This Financial Services Guide to Data + AI Summit is designed to help you get the most from your experience. We have organized a stellar lineup of Financial Services sessions with industry leaders including ABN Amro, CIBC, Coinbase, Deloitte, Navy Federal Credit Union, Nationwide, HSBC, S&P Global, Visa and more. We are also featuring a series of interactive solution demos to help you get started innovating with AI.

Take the time to network with industry experts. And be sure to check out the full agenda for the most up-to-date information.

We look forward to a compelling week of data, analytics and AI with you!

JUNTA NAKAI

Global Vice President, Financial Services and Sustainability Databricks

HIGHLIGHTS

100K+
PARTICIPANTS

200+
SPEAKERS

160
COUNTRIES

This year we are going BIG with industries!

RETAIL AND CONSUMER GOODS

FINANCIAL SERVICES

HEALTHCARE AND LIFE SCIENCES

MANUFACTURING, TRANSPORTATION AND ENERGY

COMMUNICATIONS, MEDIA & ENTERTAINMENT

PUBLIC SECTOR

Data + AI Summit 2023

SAN FRANCISCO, JUNE 26-29, 2023

Register Now

Join us live at the Moscone Center in San Francisco and check out the Financial Services sessions.

Data + AI Summit is the global event for the data community, where practitioners, leaders and visionaries come together to shape the future of data, analytics and AI. This guide outlines specific tracks relevant to Financial Services that you may be interested in. Get ready for four days packed with keynotes by industry visionaries, technical sessions, hands-on training and networking opportunities.

It's easy to register for Data + AI Summit — just sign up here.

Top 5 reasons to join our Financial Services Industry Forum and breakout sessions at Data + AI Summit:

1 Learn best practices from thought leaders at ABN Amro, CIBC, Coinbase, Deloitte, Navy Federal Credit Union, Nationwide, HSBC, S&P Global, Visa and more, who have already achieved business outcomes with data, analytics and AI

2 Gain insights on practical applications of advanced analytics in banking, capital markets and insurance

3 See how the Lakehouse for Financial Services is changing the world — one byte at a time

4 Network with other data and AI leaders and practitioners

5 Take a break and stop by our Financial Services Solutions Hub to meet Databricks industry experts and our partners

Create Your Own Experience

We hope you enjoy the program we've put together for Financial Services professionals — content is curated and presented by leading experts from banking and capital markets, payment companies and fintechs, insurance and wealth management. This guide is designed to help Financial Services attendees plan their experience and identify events of interest. It is intended to complement the full Data + AI Summit website and in-app experience.

1 FINANCIAL SERVICES INDUSTRY FORUM

Learn from the most innovative industry leaders with keynotes from some of the biggest global brands

2 BREAKOUT SESSIONS

Deep dive into specific topics and technical sessions with a leading expert from your field who has tackled the data, analytics and AI problems you are looking to solve

3 INTERACTIVE DEMOS

Join an interactive Solution Accelerator demo for popular Financial Services use cases and sessions with our data, analytics and AI experts

4 FINANCIAL SERVICES SOLUTIONS HUB

Connect with Databricks Financial Services experts, partners, technical leaders and other attendees in our dedicated lounge space for networking

All Things Financial Services at Summit

Use this section to schedule and design your Summit experience around Financial Services and our **Industry Forum**, **breakout sessions**, **interactive demos** and **networking lounge**.

Scan the QR code to add the Industry Forum to your Summit Scheduler

Mainstage Keynotes

Don't miss these featured keynotes

JPMorgan Chase & Co.   Microsoft   Google

Financial Services Industry Forum

THURSDAY, JUNE 29 | 11:40 AM — 4:00 PM PT

LOCATION: MOSCONE SOUTH

Generation AI and the Future of Financial Services

FEATURED SPEAKERS:

PAUL WELLMAN, Vice President, Executive Product Owner, Data as a Service, TD Bank

JON HOLLANDER, Vice President, Enterprise Data Technology Platforms, TD Bank

LISA BERKE, Director, P&C Data Product Management, Nationwide Insurance

JOANNA GURRY, Executive, Data Delivery, National Australia Bank (NAB)

SRAVAN KASARLA, Chief Data Officer, Thrivent

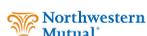**NISHA PALIWAL**, Managing Vice President, Enterprise Data and Machine Learning, Capital One

JOHN DERRICO, Vice President, Data Strategy, Mastercard

GEORGE WEBSTER, Chief Security Architect, HSBC

DON VU, Chief Data Officer, Northwestern Mutual

JOJY MATHEW, Principal, Deloitte Consulting

JUNTA NAKAI, Global Vice President and Industry Leader, Financial Services, Cybersecurity and Sustainability, Databricks

TD Bank   Nationwide   nab   thrivent   Capital One

mastercard   HSBC   Northwestern Mutual   Deloitte.
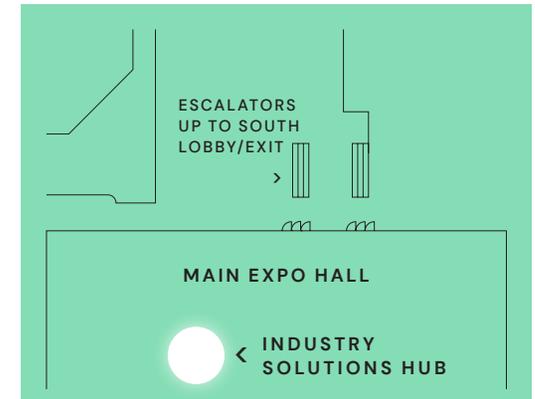
Financial Services Solutions Hub

TUESDAY, JUNE 27 | 5:00 - 7:00 PM PT

WEDNESDAY, JUNE 28 | 11:30 AM - 6:00 PM PT

THURSDAY, JUNE 29 | 11:00 AM - 6:00 PM PT

LOCATION: DATA + AI SUMMIT EXPO FLOOR, MOSCONE SOUTH

Connect with Financial Services experts, partners, technical leaders and other attendees in our dedicated lounge space for informal discussions and networking. Learn how Databricks and our partners collaborate with industry leaders to innovate and transform operations with data, analytics and AI across the industry.

ESCALATORS UP TO SOUTH LOBBY/EXIT >

MAIN EXPO HALL

< INDUSTRY SOLUTIONS HUB

Breakout Sessions

We have a full agenda of Financial Services talks taking place at Data + AI Summit. See which ones are the best fit for you.

Financial Services Sessions at a Glance

TUESDAY, JUNE 27

TIME (PT)	TYPE	TITLE	SPEAKER	COMPANY
5:00 – 7:00 PM	FINANCIAL SERVICES SOLUTIONS HUB			

WEDNESDAY, JUNE 28

TIME (PT)	TYPE	TITLE	SPEAKER	COMPANY
11:30 AM – 6:00 PM	FINANCIAL SERVICES SOLUTIONS HUB			
11:30 AM–12:10 PM	BREAKOUT SESSION	Data Democratization With Lakehouse: An Open Banking Application Case	PEDRO BOARETO, Chapter Leader of Analytics Engineering; FÁBIO LUIS CORREIA DA SILVA, Architecture Specialist	Bradesco
12:00–12:20 PM	LIGHTNING TALK	Anomalo | Scaling Data Quality With Unsupervised Machine Learning Methods	VICKY ANDONOVA, Manager, Applied Machine Learning	Anomalo
12:30–12:50 PM	LIGHTNING TALK	Writing Data-Sharing Apps Using Node.js and Delta Sharing	WILL GIRTEN, Senior Specialist Solutions Architect	Databricks
12:30–1:10 PM	BREAKOUT SESSION	IFC's MALENA Provides Analytics for ESG Reviews in Emerging Markets Using NLP and LLMs	BLAISE SANDWIDI, Lead Data Scientist, As. ESG Officer; ATIYAH CURMALLY, Principal Environmental Specialist	International Finance Corporation
12:30–1:10 PM	BREAKOUT SESSION	Streaming Tens of Millions of Events Made Simple at Visa Using Apache Spark™	VARUN SHARMA, Principal Data Engineer; DURGA KALA, Senior Director	Visa
12:30–1:10 PM	BREAKOUT SESSION	What It Takes to Democratize AI and ML in a Large Company: The Importance of User Enablement and Technical Training	ELLIE HAJARIAN, Senior IT Manager, Enterprise Information Management	TD Bank
1:30–1:50 PM	LIGHTNING TALK	Journey Toward Uniting Metastores	ANANYA GHOSH, Business Application Owner for Databricks	Nationwide Insurance
1:30–2:10 PM	BREAKOUT SESSION	Data Reliability Engineering: A New Approach to Data Quality	EGOR GRYAZNOV, CTO and Co-founder	Bigeye
1:30–2:10 PM	BREAKOUT SESSION	Unlocking the Value of Data Sharing in Financial Services With Lakehouse	SPENCER COOK, Senior Solutions Architect, Financial Services	Databricks
1:30–2:10 PM	BREAKOUT SESSION	Using Databricks to Power Insights and Visualizations on the S&P Global Marketplace	ONIK KURKTCHIAN, Head of S&P Global Marketplace Workbench	S&P Global

WEDNESDAY, JUNE 28

TIME (PT)	TYPE	TITLE	SPEAKER	COMPANY
11:30 AM – 6:00 PM	FINANCIAL SERVICES SOLUTIONS HUB			
2:00–2:20 PM	LIGHTNING TALK	Privacera | Applying Advanced Data Security Governance With Databricks Unity Catalog	DON BOSCO DURAI, Co-founder and CTO	Privacera
2:30–3:10 PM	BREAKOUT SESSION	How Coinbase Built and Optimized SOON, a Streaming Ingestion Framework	CHEN GUO, Staff Software Engineer; ARUJIT PRADHAN, Software Engineer	Coinbase
3:30–4:10 PM	BREAKOUT SESSION	ABN Story: Migrating to a Future-Proof Data Platform	RAKESH SINGH, Lead Architect; MARCEL KRAMER, Head of Data Engineering	ABN AMRO Bank
3:30–4:10 PM	BREAKOUT SESSION	Disaster Recovery Strategies for Structured Streams	SACHIN BALGONDA PATIL, Solutions Architect; SHASIDHAR ERANTI, Specialist Solutions Architect	Databricks
3:30–4:10 PM	BREAKOUT SESSION	Strategies for Developing Data Products: How Infusion and Composability Are Changing User Expectations for Working With Data	SCOTT CASTLE, Chief Strategy Officer	Sisense

Financial Services Sessions at a Glance

THURSDAY, JUNE 29				
TIME (PT)	TYPE	TITLE	SPEAKER	COMPANY
**11:00 AM – 6:00 PM	FINANCIAL SERVICES SOLUTIONS HUB**				
11:40 AM–4:00 PM	FINANCIAL SERVICES INDUSTRY FORUM		**Generation AI and the Future of Financial Services**	
11:30 AM–12:10 PM	BREAKOUT SESSION	**Advancing Customer Centricity: Mission Data's Data and Analytics Transformation**	LEENA DALVI Assistant Vice President, Enterprise Data and Analytics	Navy Federal Credit Union
11:30 AM–12:10 PM	BREAKOUT SESSION	**Counterintuitive Data Engineering: It's Not Always an Anti-Pattern**	RYAN HARRIS Principal Cybersecurity Engineer	HSBC
1:00–1:20 PM	LIGHTNING TALK	**LTIMindtree	Fast-Track to the Future With a GenAI-Powered Lakehouse**	ABHISHEK PATEL Head of Databricks COE XUE YANG Solutions Architect	LTIMindtree Databricks
1:30–2:10 PM	BREAKOUT SESSION	**Activate Your Lakehouse With Unity Catalog**	ANUP SEGU Co-head of Data Engineering	YipitData
2:00–2:20 PM	LIGHTNING TALK	**How CIBC Integrated Purview and Unity Catalog for Our Data Governance Within a Data Mesh Architecture Leveraging the Lakehouse**	MEENA RAM Senior Director, Enterprise Data and Records Management Office	CIBC
3:30–4:10 PM	BREAKOUT SESSION	**Delta Sharing: Overfetching, Underfetching, and Other Lessons Learned While Building the Excel Add-In**	ROGER DUNN Co-founder, CTO	Exponam

The agenda for this Forum is subject to change. Please check back for more details.

Ask an expert

If you'd like to learn more as a follow-up to any of the sessions, please reach out to your account manager to coordinate a meeting with:

- Financial Services leaders and subject matter experts
- Technical data experts and partners in Financial Services
- Solution architects who have helped hundreds of customers

Learn more about Lakehouse for Financial Services at **dbricks.co/fiserv**

Register Now