

EDM Webinar

Transforming How Enterprises Source And Manage Legal Entity Reference Data

Panel discussion with:



Donna Rudnicki
Managing Director,
Head of Global Data
Management
RBC Capital Markets



Gordo Wilson
Managing Director &
General Manager, CDO
SMBC Americas
Division



Dessa Glasser
Principal, Data Advisory &
Analytics, FRG
Advisory Board, Xoriant Cdi
Independent Director,
Oppenheimer & Co.



Masood Khatri
VP, Product Owner
Xoriant CDi



Moderated by Mike Meriton

Co-Founder & COO, EDM Council

- Mike is Co-Founder & COO of the EDM Council
- Served as the first Chairman and active Board member since inception in 2005
- Joined EDM Council in 2015 as a Senior Advisor to lead Industry Engagement strategy, new member services and Council Operations
- Previously the CEO of GoldenSource and held key executive roles at CheckFree (Fiserv), D&B and Oracle.



Today's panel



Dessa Glasser

Industry View:

- Principal, Data Advisory & Analytics, FRG
- Independent Board Member, Oppenheimer & Co.
- Advisory Board Member, Xoriant
- Co-Chair: EDMC Women Data Professionals

Prior:

- CDO, JPMorgan Chase, Asset & Wealth Management
- Deputy Director Office of Financial Research
- CRO, Bunge
- Other: Merrill Lynch; Credit Suisse, KPMG, IBM



Donna Rudnicki

CDO View:

- Managing Director at RBC Capital Markets
- Co-chair, EDMC Women Data Professionals
- Mentor, Women in Capital Markets

Prior:

- Head of IT Infrastructure and Data Management, Canada Pension Plan Investment Board (CPPIB)
- Waters Technology EDM Professional of the Year, 2020



Gordo Wilson

CDO View:

- Managing Director & General Manager, Chief Data Officer, SMBC Americas Division

Prior:

- MD, Head of Global Business Data Strategy, CDO Office, JPMorgan Chase Asset & Wealth Management
- MD, Head of Field Enablement & Business Analytics, Treasury Services, JPMorgan Chase Consumer Bank
- Naval Officer, Commander, US Navy



Masood Khatri

Service Provider/Product Owner View:

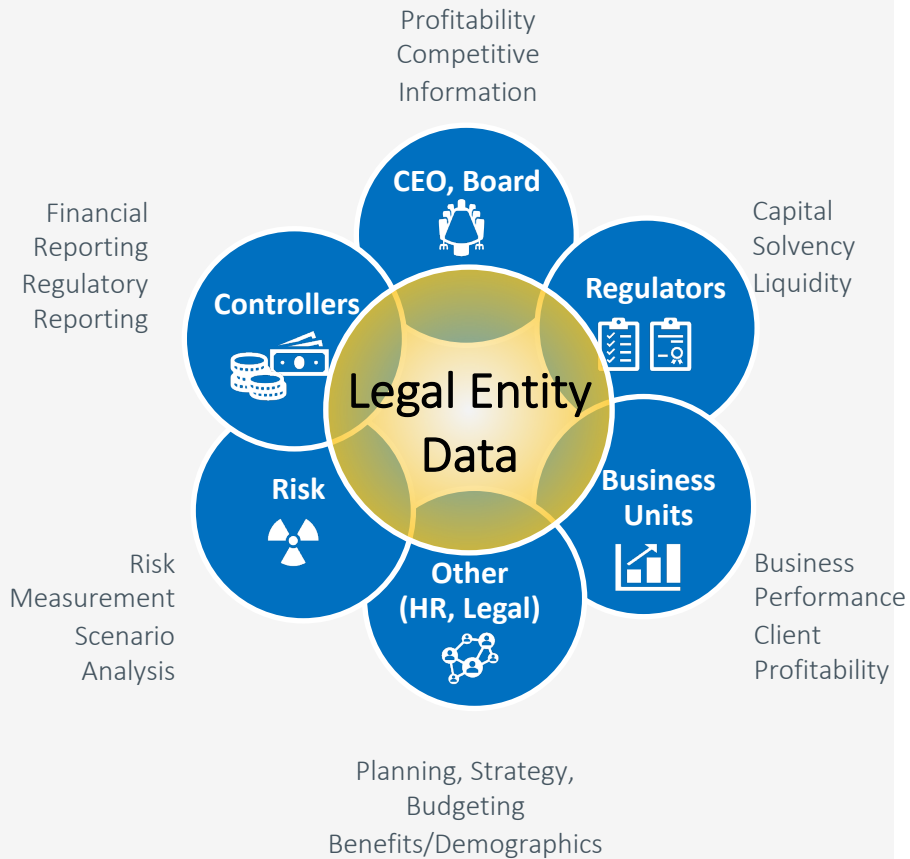
- VP, Product Owner Xoriant CDi

Prior:

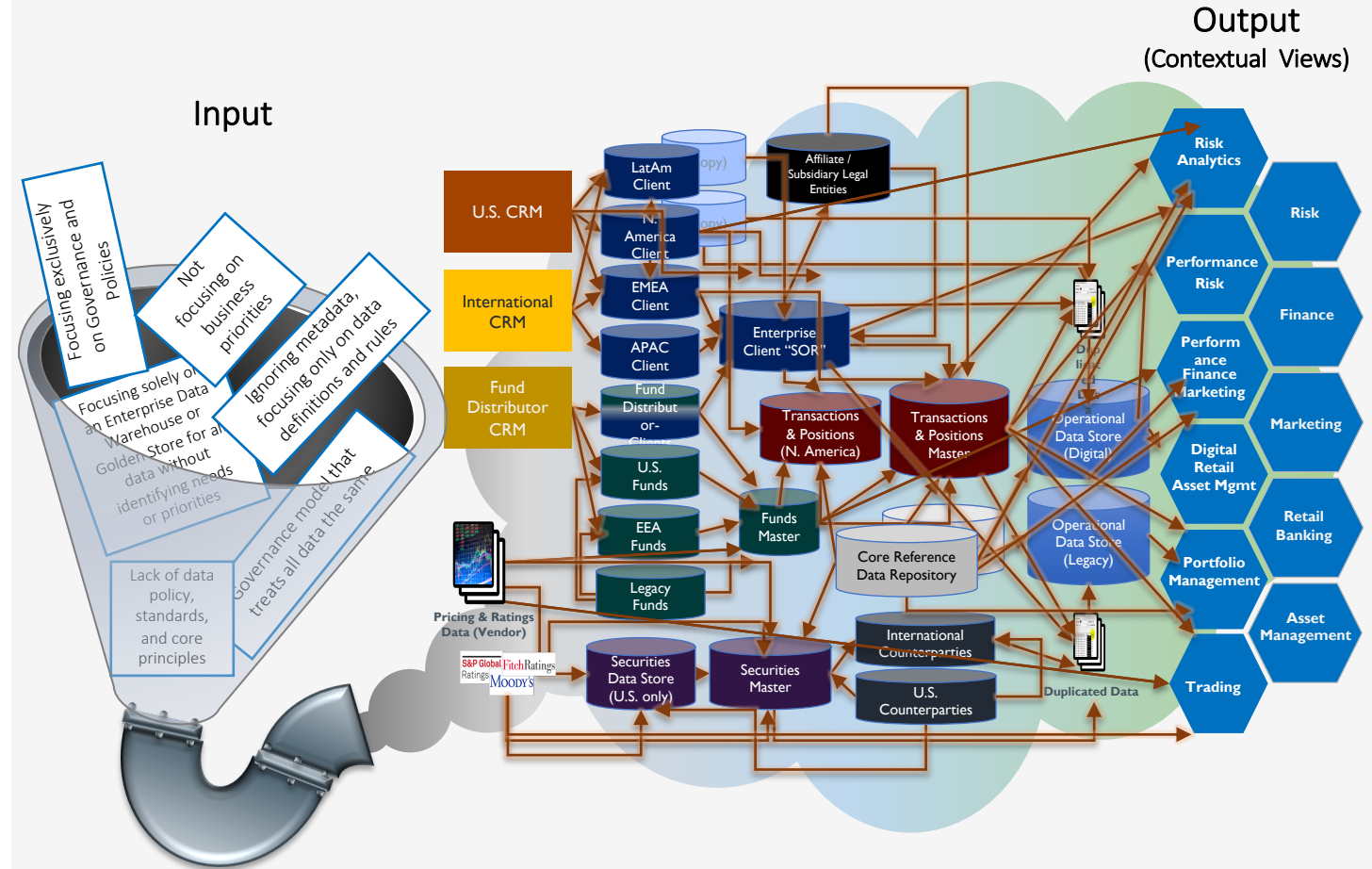
- Founder of multiple Technology Startups
- Principal Consultant at Prudential, Citigroup & PWC
- Advisor, Mentor and Board Member for various Startups

Legal Entity data needs and challenges

Legal Entity data users require unique views

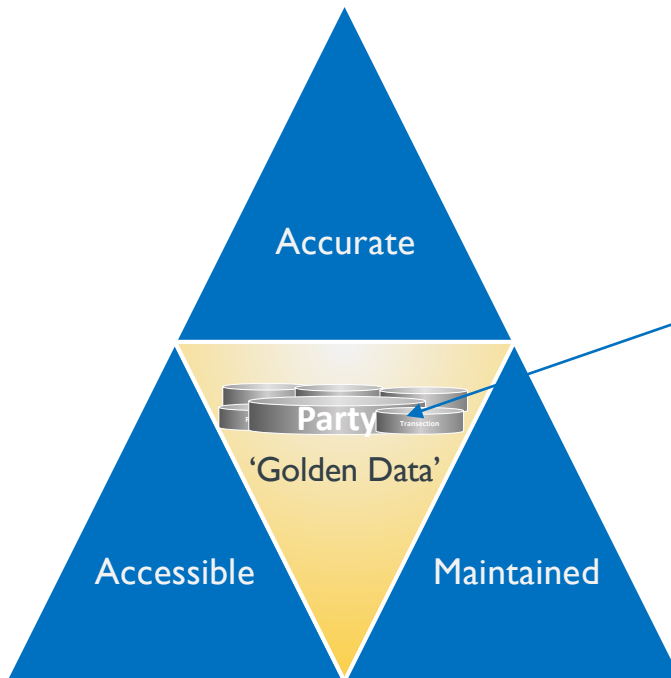


Traditionally, data management has focused on unique solutions



Opportunity: A data centric model to leverage Legal Entity data

A strategy that covers People, Process, Technology and Data must be coordinated across the organization and focused on providing accurate, accessible and well-maintained data



- Key is to deliver critical 'core' Legal Entity (Party) data from trusted sources, that can be shared across the organization and used in all critical reports and processes
- Core Party data may be enhanced, with different 'views' and definitions that must be captured, including logic, transformations and critical metadata
- Vendors and technology can be leveraged to optimize performance and to combine Party data with additional data to gain further insights

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Questions?



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