

2025 Options Industry Conference® Agenda

Tuesday, May 6, 2025

3:00 – 3:05 p.m.

Welcome and Opening Remarks

3:05– 3:15 p.m.

OCC Update: Dan Bussy, Chief Operating Officer, OCC

3:15 – 4:00 p.m.

Fireside Chat with The Honorable Hester M. Peirce

Dan Busby, Chief Operating Officer, OCC will lead a fireside chat with **The Honorable Hester M. Peirce**, Commissioner, U.S. Securities and Exchange Commission.

4:00 p.m. - 4:45 p.m.

State of the Industry

In an increasingly data-driven world, this panel will explore how market participants are leveraging big data, artificial intelligence, and advanced analytics to inform trading strategies, manage risk, and predict market trends. As technology evolves, so do the ways in which we interact with the markets.

Moderator: **Henry Schwartz**, Vice President, Market Intelligence, Cboe Global Markets

Panelists:

Arianne Adams, Chief Strategy Officer & Head of Derivatives, Webull

Matt Amberson, Principal, ORATS

Steve Sosnick, Chief Strategist, Interactive Brokers

Wednesday, May 7, 2025

9:00 – 9:45 a.m.

The Evolution of Retail Options Trading: Navigating Change in a Dynamic Landscape

As we look into the future of options trading, several transformative factors are reshaping the market. This session will explore the implication of Payment for Order Flow (PFOF) on trading volumes and market liquidity, alongside the evolving landscape of risk management practices. We will discuss the changing profile of the modern investor, one increasingly influenced by technological advancements, educational resources, and AI-driven strategies and how they are revolutionizing trade execution and portfolio management.

Moderator: **JJ Kinahan**, Chief Executive Officer, IG North America

Panelists:

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Christopher Larkin, Managing Director, Head of Trading & Investing, E*TRADE from Morgan Stanley

Tanya Patwa, Head U.S. Options Sales, Nasdaq

Tony Zhang, Chief Strategist, OptionsPlay

Patrick Zielinski, Chief Executive Officer, Box Options Market

9:45- 10:30 a.m.

The Rise of Defined Outcome ETFs: Opportunities and Impacts on Options and Futures Markets

Defined outcome ETFs are redefining how investors manage risk and achieve targeted outcomes in their portfolios. This panel will delve into how these ETFs use options to mitigate risk, their role in managing market volatility, and the ripple effects they are creating across the options and futures markets.

Moderator: Geoff Gaiss, Vice President, Global Derivatives, TRAFIX

Panelists:

John DiBacco, Global Head of Derivatives, Clear Street

Brian Gilbert, Head of Options Market Development, NYSE

Sara Levin, Director, ETF and Derivative Trading, WallachBeth Capital

Matt McFarland, Senior Vice President, Capital Markets, Vest Financial

11:00 a.m. – 12:00 p.m.

Keynote Speaker: Maurice Conti

Maurice Conti is among the architects of the cutting-edge emerging technologies that are evolving humanity and the world around us: Artificial Intelligence, immersive reality (AR/VR/XR), advanced robotics and manufacturing, and technology for sustainability. He is a rare blend of hands-on practitioner and big thinker.

1:00 – 1:45 p.m.

Emerging Technologies, Advanced Analytics and Automation in Options Trading: Transforming Strategies and Market Dynamics

Cutting edge technologies are reshaping the landscape of options trading, enhancing decision-making processes, and driving innovation in trading strategies. This panel will explore how market participants leverage sophisticated modeling techniques to identify opportunities, optimize trade execution, and navigate the ethical challenges associated with increased reliance on automation in financial markets.

Moderator: Ivan Brown, Chief Operating Officer, Options, IEX

Panelists:

Steve Crutchfield, Head of Business Development, Chicago Trading Company

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Joe Mazzola, Director, Trading & Education, Charles Schwab & Co

Nate Pomeroy, Principal, Wolverine Trading

1:45 – 2:30 p.m.

Shaping the Future of Options Education: Empowering the Next Generation

In the ever-evolving world of financial markets, options trading has experienced rapid growth among retail and institutional investors alike. Examining new educational mediums and methodologies is at the heart of this discussion as we present multiple perspectives on how education in the options space is happening now and how it may transform in the future. This panel will dive into the latest developments in options education, highlighting the strategies, tools and platforms that are empowering the next generation of traders.

Moderator: Jessica Inskip, Director of Investor Research, StockBrokers.com

Panelists:

Mark Benzaquen, Principal, Investor Education, OCC

Jermal Chandler, Head of Options Strategy, tastytrade

Brent Kochuba, Founder, SpotGamma

Thursday, May 8, 2025

9:00 – 9:45 a.m.

Navigating Market Trends: Buyside Perspectives in Options Trading

This discussion will focus on the buyside's view of the evolving options market, covering topics such as flexibility in trading strategies, the impact of new technologies, and how innovations in index and ETF products are influencing portfolio construction and risk management.

Moderator: Joe Lewis, Head of Corporate Hedging and FX Solutions, Jefferies Financial Group

Panelists:

Rachna Mathur, Head of Equities, Americas, EUREX

Eric Metz, Managing Director, Chief Investment Officer & Head of SpiderRock Advisors

John Smollen, Executive Vice President, Exchange Traded Products, MIAX

9:45 – 10:30 a.m.

Decoding D.C.: A New Administration and a New Congress Could Mean Another Major Rewrite of the U.S. Tax Code

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The new 119th Congress features new leaders on a number of committees relevant to the financial services industry, and a number of initiatives that could impact options, including a comprehensive tax package, digital asset legislation and potential legislative changes for capital markets. This session will provide an update on policy proposals that may impact the U.S. options markets. Washington representatives from across the industry will discuss their legislative advocacy efforts in Washington DC on behalf of the U.S. options industry and share their predictions for the current Congress.

Moderator: Jim Hall, Executive Director, Government Relations, OCC

Jameel Aalim-Johnson, Vice President, Office of Government Relations, Nasdaq

Rob Eskridge, Director Government Affairs, ICE/NYSE

Jeff Strunk, Managing Partner, Forbes Tate Partners

11:00 a.m. – 12:00 p.m.

Future Forward: Embedded Optionality in Market Innovation

As technology, regulatory changes and market dynamics continue to evolve, the options market is on the brink of significant transformation. This panel will explore how new innovations - from AI and automation to regulatory changes - are reshaping trading behavior, risk management, and market structure.

Moderator: Tommy Martin, Chief Strategy Officer, Dash Financial Technologies

Panelists:

Annabelle Baldwin, Chief Revenue Officer, SpiderRock

Shawn Cruz, Business Development Lead, IMC

Geralyn Endo, Head of Options Business Development, MEMX