

# 2022 Options Industry Conference<sup>SM</sup>

## Agenda

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Tuesday May 10, 2022

3:00 – 3:15 PM

Welcome and Opening Remarks

3:15 – 4:15 PM

State of the Industry

Moderator: Henry Schwartz, Senior Director, Head of Product Intelligence, Cboe Global Markets

Panelists:

Anabelle Baldwin, Chief Revenue Officer, SpiderRock Holdings, LLC

Antonio Goncalves, Senior Vice President Americas, Board Advisor Devexperts and dxFeed Data Solutions, Devexperts, Inc.

4:15 – 5:00 PM

Rise of Retail: What's Next?

Moderator: JJ Kinahan, Vice President and Chief Market Strategist, tastytrade

Panelists:

Greg Ferrari, Vice President, Head of U.S. Options, Nasdaq

Ovidio Montemayor, Managing Director, Trading Operations, Charles Schwab

Greg Stevens, Vice President, Options Experience Independent Investing, Fidelity Investments

Wednesday May 11, 2022

9:00 – 9:45 AM

Current Issues in Market Structure

Moderator: Alicia Crighton, Managing Director, Goldman Sachs

Panelists:

Steve Luparello, Former Director of Trading and Markets, U.S. Securities and Exchange Commission

Scot Warren, Chief Operating Officer, OCC

Slade Winchester, Director, Derivatives Trading Platforms, Citigroup Global Markets

9:45– 10:30 AM

Institutional Perspectives on Today's Options Markets

Moderator: Jason Roelker, Head of Institutional Equity Derivative Sales, Citadel Securities

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### Panelists:

Arianne Adams, Senior Vice President, Head of Derivatives & Global Client Services, Cboe  
Meaghan Dugan, Head of Product & Competitive Strategy, NYSE  
Jason Hedberg, Global Head of Equity Derivatives Flow Distribution, UBS

**11:00 AM – 12:00 PM**

**Keynote: Margaret Brennan**, Moderator of CBS News' Face the Nation and CBS News' Chief Foreign Affairs Correspondent

**Moderator: Craig Donohue**, Executive Chairman, OCC

**1:00 – 1:45 PM**

**Diversity, Equity and Inclusion: Strides in the Industry**

**Moderator: Elizabeth King**, President, ESG & Chief Regulatory Officer, Intercontinental Exchange

### Panelists:

Bevon Joseph, Executive Director and Co-Founder, Greenwood Project  
Carla Dawson, Chief Human Resources Officer, OCC  
Nicole Robinson, Associate Partner, McKinsey & Company

**1:45 – 2:30 PM**

**New Frontiers: Innovations Changing the Industry**

**Moderator: Paul Jiganti**, Managing Director, Business Development and Market Structure Strategy, IMC

### Panelists:

Thomas Gallagher, Chairman & Chief Executive Officer, MIAX  
Jeanine Hightower-Sellitto, Chief Executive Officer, Atomyze  
Steve Quirk, Chief Brokerage Officer, Robinhood

## Thursday May 12, 2022

**8:30 – 9:15 AM**

**Secure Markets: Tackling Cybersecurity Challenges**

**Moderator: John P. Davidson**, Chief Executive Officer, OCC

### Panelists:

Andrew Derboben, AVP, Global Security Operations and Incident Response, Nasdaq  
Erik Dries, Executive Director Cyber Defense, OCC  
David Harris, Co-Founder, Manetu, Inc.

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**9:15 – 10:00 AM**

Washington Perspectives

**Moderator:** Jim Toes, President & CEO, Security Traders Association

**Panelists:**

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

**Gene DeMaio**, Executive Vice President, Options Regulation & Trading Execution, FINRA

**Ellen Greene**, Managing Director, Equity and Options Market Structure, SIFMA

**10:30 – 11:15 AM**

**Keynote:** The Honorable Dawn DeBerry Stump, Former Commissioner, U.S. Commodity Futures Trading Commission

**Moderator:** Julie Bauer, Chief External Relations Officer, OCC

**11:15 AM – 12:00 PM**

Market Outlook 2022

**Moderator:** Kaitlin Meyer, Vice President, Marketing & Sales, MIAX

**Panelists:**

**Shawn Cruz**, Director of Derivative Strategy and Trading, TD Ameritrade

**Tommy Martin**, Co-Head of Options, Dash (an ION Company)

**Patrick Zielinski**, Interim Chief Executive Officer, BOX