

# 2023 Options Industry Conference<sup>SM</sup>

## Agenda

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Wednesday April 26, 2023

3:00 – 3:15 PM

Welcome and Opening Remarks

3:15 – 4:15 PM

Options Markets Today

Moderator: JJ Kinahan, Chief Executive Officer, IG North America, *tastytrade/tasty/live*

Panelists:

Joe Bracco, Senior Vice President, Head of Sales, MIAx

Jason Hedberg, Global Head of Equity Derivatives and Flow Distribution, UBS

Henry Schwartz, Vice President, Global Head of Client Engagement, Cboe Global Markets

4:15 – 5:00 PM

Market Structure: Change on the Horizon

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

Panelists:

Greg Berman, Managing Director, Market Analytics and Regulatory Structure, Citadel

Mark Davies Co-Founder and Chief Executive Officer, S3

Meaghan Dugan, Head of Options, NYSE

Thursday April 27, 2023

9:00 – 9:45 AM

Today's Trends in Retail

Moderator: Greg Stevens, Vice President Fidelity Investments

Panelists:

Sean Feeney, Head of Options, Nasdaq

Ravi Jain, Chief Product Officer, Sterling Trading Tech

Ming Zhao, Chief Executive Officer, Atomic Vaults

9:45- 10:30 AM

A World of Options: International Interest in Options Markets

Moderator: Annabelle Baldwin, Chief Revenue Officer. SpiderRock

Panelists:

Arianne Adams, Senior Vice President, Head of Derivatives, Cboe Global Markets

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Kevin McCarthy, Managing Director, Head of Financing and Clearing, BofA Securities  
Tanya Patwa, Managing Director, Head of U.S. Options Sales, Nasdaq

**11:00 AM – 12:00 PM**

Keynote Speaker: The Honorable Summer K. Mersinger, Commissioner, Commodity Futures Trading Commission

Moderator: Julie Bauer, Chief External Relations Officer, OCC

**1:00 – 1:45 PM**

Building Industry Diversity for a Strong Future

Fireside Chat:

Jill Sommers, Chair, Derivatives Practice Group, Patomak Global Partners  
Lule Demmissie, U.S. Chief Executive Officer, eToro

**1:45 – 2:30 PM**

From Cloud to Crypto: Innovation, Technology and Cybersecurity in Focus

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

Panelists:

Andrej Bolkovic, Chief Executive Officer, OCC  
Nick LaMaina, Global Head of Broker Dealer Solutions, eToro  
Tony Zhang, Chief Strategy Officer, OptionsPlay

## Friday April 28, 2023

**8:30 – 9:15 AM**

Institutional Perspectives on Today's Options Markets

Moderator: Pat Hickey, Managing Director Participant Services and Solutions, OCC

Panelists:

Megan Morgan, Head of Market Structure, Belvedere  
Sean Truett, Senior Vice President, Strategy and Business Development, BOX Options Market, LLC  
Matt Weinstein, Senior Derivatives Salesperson, Citadel Securities

**9:15 – 10:00 AM**

Washington Outlook

Moderator: Walton Liles, Principal, Blue Ridge Law and Policy

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**Panelists:**

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

Jim Hall, Executive Director, Government Relations, OCC

Jim Toes, President & CEO, Security Traders Association

**10:30 – 11:15 AM**

**Keynote: Greg Williams, Editor, WIRED**

**11:15 AM – 12:00 PM**

**Market Outlook: Trends and Predictions for What's Ahead**

**Moderator: Geralyn Endo, Member Experience, MEMX**

**Panelists:**

David Cross, Co-Head of Options, Dash

Jim Hyde, Senior Director, Head of Business Development and Strategic Partnerships, ICE/NYSE

Kevin "Lex" Luthringshausen, Senior Vice President, Sales and Business Development, Tradier, Inc.