

AGENDA

Harold Pratt House / 58 East 68th Street / New York, NY 10065

Tuesday, November 18, 2025

1:00 PM **Opening Networking Reception**

Elevated hors d'oeuvres will be served

2:00 PM **Welcome**

Dennis Carey – Founder, CEO Academy

Sandy Climan – Chairman, CEO Academy

Michael Useem – William and Jacalyn Egan Professor Emeritus of Management and Faculty Director, Leadership Center & McNulty Leadership Program, The Wharton School

2:15 PM **Leading Through Uncertainty: A CEO's Playbook for Resilience, Risk, and Reinvention**

Charles F. Lowrey, executive chairman and former CEO of Prudential Financial, brings decades of front-line leadership in navigating global disruption, geopolitical risk, and market volatility. In this candid fireside chat, Lowrey will share hard-earned lessons from steering one of the world's largest financial institutions through economic crises, digital transformation, and shifting regulatory landscapes. From balancing long-term vision with near-term stakeholder pressure to redefining risk in an age of uncertainty, this session offers an unfiltered look at what it takes to lead a legacy institution through profound change – and emerge stronger. CEOs and senior leaders will walk away with insights not found in boardroom decks or annual reports: the nuanced realities of modern leadership when the stakes are highest.

Speaker: **Charles F. Lowrey** – Executive Chairman, Prudential Financial

Moderator: **Emily M. Dickens** – Chief of Staff, Head of Government Affairs and Corporate Secretary, SHRM

3:00 PM **The Next Shockwave: What Every CEO Must Know About the U.S. Economy's Shifting Center of Gravity**

A storm is building across the global economy – one shaped by inflationary aftershocks, tightening credit markets, geopolitical fragmentation, and the rapid acceleration of AI. In this high-stakes briefing, Aditya Bhawe, senior U.S. economist at Bank of America, will cut through the noise to deliver a data-backed outlook on what's coming next and what it means for executive decision-making. From capital allocation and talent strategy to navigating regional instability and preparing for future rate shifts, this session will equip CEOs with the insight and foresight needed to seize emerging opportunities and safeguard long-term value in an increasingly unpredictable world.

Speaker: **Aditya Bhawe** – Managing Director and Senior U.S. Economist, Bank of America

3:45 PM **The Human Exploit: Why Your People Are the Biggest Cybersecurity Risk**

In an increasingly interconnected world, cyberthreats have evolved into critical business risks that impact every level of an organization. In this eye-opening session, former Defense Intelligence Agency (DIA) operative and cybersecurity expert Shawnee Delaney reveals how today's most dangerous breaches aren't just technical – they're psychological. Drawing on her deep experience in espionage, insider threat detection, and cyber-infiltration tactics, Delaney will expose the blind spots CEOs and boards often overlook when it comes to protecting data, intellectual property, and infrastructure. From social engineering and credential phishing to the behavioral tells of a malicious insider, she'll explore how nation-state actors and cybercriminals target organizations not through code, but through people. Attendees will leave with practical strategies for creating a "human firewall" at the executive level – because in the new era of cybersecurity, leadership is your first line of defense.

Speaker: **Shawnee Delaney** – Former DIA Clandestine Services Officer; CEO, Vaillance Group

4:30 PM

Insight to Action: A Peer Forum on Leading Through Risk, Disruption, and Human Complexity

Following three provocative sessions on leadership in an age of disruption, this facilitated peer-to-peer dialogue gives you the opportunity to go beyond the keynote and into the trenches with fellow senior executives. In trusted, small-group circles, you'll unpack the personal implications of what you've just heard—from confronting economic volatility and rethinking resilience to redefining your role in cybersecurity and human risk. This is your space to pressure-test ideas, surface blind spots, and wrestle with the challenges that don't make it onto board slides.

Breakouts: **Pierre Heistein** — Executive Facilitator, Moderator and Author, SHRM Linkage

5:15 PM

The Future of Capital: Navigating Investment Strategy and Financial Innovation

From digital currencies to shifting interest rates and evolving capital markets, CEOs are confronting a rapidly changing financial landscape. This session explores how forward-looking leaders are rethinking investment strategy and balancing innovation with risk amid macroeconomic volatility, supply chain disruption, and regulatory uncertainty. Learn how emerging financial technologies and new models of capital deployment can position your organization for resilience, agility, and long-term growth.

Speaker: **Michael Terpin** — Founder and CEO, Transform Ventures

6:00 PM

Networking & Cocktails

6:45 PM

(DINNER) Boardroom Dynamics: Leadership, Strategy, and Succession in a Transforming Landscape

As boards take on greater influence over strategy, risk, and leadership, the relationship between executives and directors has become pivotal. At the same time, CEO succession planning has grown into a critical priority, with transitions shaping the future of organizations. This session offers practical insights on navigating evolving governance dynamics, fostering productive board relationships, and building leadership pipelines that are agile and future-ready—all to ensure stability and long-term success.

8:30 PM

End-of-Day Wrap-Up

Wednesday, November 19, 2025

7:30 AM **Informal Breakfast**

8:00 AM **The AI-First CEO: Leading in an Era of Intelligent Enterprises**

Artificial intelligence is no longer a side project; it is rapidly becoming the operating system of modern business. From supply chains and workforce management to customer engagement and product innovation, AI is redefining the fundamentals of competition. In this fireside chat, George Oliver draws on lessons from leading a global industrial company and his role on the board of RTX to explore how CEOs should approach AI as both an enabler and disruptor. This conversation is designed to help CEOs reframe AI not as a technological function, but as a leadership imperative with far-reaching strategic implications.

Speaker: **George R. Oliver** – Former Chairman and CEO, Johnson Controls

Moderator: **Dennis Carey** – Founder, CEO Academy; Vice Chairman, Korn Ferry

8:45 AM **Power, Pressure, and Pivot Points: Leading Through Geopolitical Upheaval and Global Realignment**

A new era of geopolitical complexity is taking shape – defined by fractured alliances, election-fueled uncertainty, China’s global overproduction, rising economic nationalism, and the accelerating influence of AI and digital infrastructure on global power dynamics. For senior leaders, this is not just background noise – it’s a reshaping of the playing field. In this high-stakes session, you’ll explore what it means to “win” in the age of volatility and how to position your organization to lead through disruption, de-risk your global footprint, and thrive amid the convergence of technology, talent, and geopolitics.

Speaker: **Ram Charan** – Director; Advisor to Global CEOs and Boards

9:30 AM **Break**

9:40 AM **The Future Is Fragmented: How CEOs Must Lead in an Age of Relentless Reinvention**

Robert C. Wolcott, an innovation advisor, co-founder of The World Innovation Network (TWIN Global), and *Forbes* columnist, has spent his career tracking how technological, societal, and business model shifts reshape the very fabric of value creation. In this provocative session, Wolcott unpacks what many executives miss: that disruption is no longer episodic – it’s continuous, decentralized, and coming from the edges. Drawing from decades of research and work with Fortune 500 companies and fast-scaling ventures alike, he will explore how leaders can stay ahead of fast-emerging trends – such as ambient AI, hyper-personalized production, digital ecosystems, and exponential technologies – *before* they go mainstream.

Speaker: **Robert C. Wolcott** – Co-Founder and Chair, TWIN Global

Moderator: **Sandy Climan** – Chairman, CEO Academy; CEO, Entertainment Media Ventures

10:25 AM **Insight to Action: Confronting Complexity Across Capital, Talent, Technology, and Global Risk**

After a sweeping look at the disruptive forces reshaping leadership today – from financial innovation and AI acceleration to talent upheaval and geopolitical realignment – this peer-driven dialogue invites you to step into a trusted circle of senior executives for deeper, more personalized reflection. In expertly facilitated small groups, you’ll move from high-level insight to direct application – examining what today’s volatility means for your strategy, your team, and your long-term positioning.

Breakouts: **Pierre Heistein** – Executive Facilitator, Moderator and Author, SHRM Linkage

11:15 AM

Built to Outlast: The Leadership Playbook for Enduring Growth and Market Dominance

What does it take to scale a company tenfold without losing its soul – or its edge? In this session, Mark A. Turner, former CEO and executive chairman of WSFS Financial Corporation, shares hard-earned insights from his leadership journey growing WSFS into a high-performing, values-driven organization. Drawing on decades of experience in financial services and his work in the book *The Path to Sustained Excellence*, which he co-wrote, Turner unpacks the key levers behind long-term, high-impact growth: disciplined leadership, bold innovation, strategic diversification, and an unwavering focus on value creation. Learn how enduring organizations outpace their peers, win investor confidence, and maintain cultural integrity through every stage of expansion – all while staying true to their core purpose.

Speaker: **Mark A. Turner** – Former CEO and Executive Chairman, WSFS Financial Corporation

Moderator: **Christopher D. Lopez** – Managing Director, CEO Academy

NOON

(LUNCH) Leading Through Crisis: Lessons in Resilience, Innovation, and Ethical Decision-Making

Crisis doesn't build character – it reveals it. In this intimate conversation, Alex Gorsky, former chairman and CEO of Johnson & Johnson, offers a behind-the-scenes look at leading through some of the most consequential crises of our time – from global health emergencies to reputational and operational challenges. With candor and clarity, Gorsky will reflect on the pressures of high-stakes leadership, the moral choices that define a company's legacy, and the role of purpose-driven innovation in driving resilience and trust. This session is a rare opportunity to learn how principled leadership and long-term vision can not only weather a crisis, but emerge stronger on the other side.

Speaker: **Alex Gorsky** – Former Chairman and CEO, Johnson & Johnson

1:30 PM

Capitalizing on New Leadership Models for Sustainable Success

Join Wharton professors Michael Useem and Harbir Singh, two of the world's leading voices on strategy and leadership, for a thought-provoking look at Japan's emerging model of corporate leadership. Drawing from their in-depth research and recent book *Resolute Japan*, this session explores how Japanese companies are navigating today's global pressures while outperforming in areas including shareholder return, stakeholder trust, and organizational resilience. In an era defined by volatility and competing priorities, Useem and Singh will offer fresh insights into how leaders can drive enduring success without compromising agility, responsibility, or results.

Speaker(s): **Michael Useem** – William and Jacalyn Egan Professor Emeritus of Management and Faculty Director, Leadership Center & McNulty Leadership Program, The Wharton School

Harbir Singh – Mack Professor; Professor of Management; Co-Director, Mack Institute for Innovation Management; and Faculty Director, Huntsman Program, The Wharton School

2:15 PM

Insight to Action: Leading for the Long Game – Endurance, Crisis, and Purpose-Driven Growth

After hearing from leaders who've scaled companies, navigated global crises, and redefined what sustainable success looks like, this peer-to-peer session invites you to step off the main stage and into the real conversation. In confidential, expertly facilitated small-group circles, you'll connect with fellow senior executives to explore what enduring leadership means in your own context – whether you're steering through uncertainty, scaling with purpose, or rethinking your model for long-term value. This isn't about theory; it's about the choices, trade-offs, and convictions that shape your leadership when the stakes are high.

Breakouts: **Pierre Heistein** – Executive Facilitator, Moderator and Author, SHRM Linkage

3:00 PM

Key Takeaways and Certificate Presentation

3:15 PM

End of Program