

FINANCIAL WORKPLACE

NEW YORK W

EXPLORE THE FUTURE FINANCIAL WORKPLACE

HSBC, THE SPIRAL, HUDSON YARDS, NEW YORK

THURSDAY FEBRUARY 27TH

09:00 - 17:00

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WORKTECH ACADEMY



Conference Producer,
WORKTECH Events

A warm welcome to Financial Workplace New York

Financial Workplace is the forum for all workplace professionals involved in the future of work and the workplace for the financial sector.

This exciting event will feature an insightful programme of peer-to-peer discussions and thought leadership sessions with workplace visionaries, exploring the changing landscape of work and the purpose of the workplace.

Our agenda will explore transformative shifts in work culture, technology integration, and employee expectations. Join us to gain perspectives from industry leaders and thought pioneers on the evolving world of work in 2025.

Secure your spot now and be part of the conversation defining the future workplace!

Warmest regards,
Samantha

CONTENTS



SPEAKERS



SESSSIONS



CONFERENCE AGENDA



VENUE



WHO ATTENDS



KEY INFORMATION

MEET THE SPEAKERS



Financial Workplace New York will attract some of the biggest and brightest names to debate, discuss, and divulge the latest thinking on the future of work and the workplace.

The conference will feature leading international thinkers from industry and academia. Our speakers represent some of the world's biggest brands and best universities and research departments, alongside radical visionaries from new innovative organisations.

Through interdisciplinary speakers and learning experience, we focus on bringing cutting edge ideas and inspiration to the workplace community to enhance creativity and move thinking forward. Instead of focusing on peer to peer innovation through imitation, we aim to curate a unique programme, bringing together experts in the fields of people, place and technology and relevant adjacencies to reflect on the future of work and workplace.

Alongside the conference series, the WORKTECH Academy knowledge hub explores the future of work through six key themes: people, place, technology, design, culture and innovation. Creating leading commentary, research and publications that places scientific research at the heart of key business problems. www.worktechacademy.com

Full list of speakers

Brandon Arcement [SwiftConnect](#)
Kelcia Azevedo [Macquarie](#)
Jian Bland [Mastercard](#)
Andrew Burdick [Macquarie](#)
Grant Christofely [M Moser Associates](#)
Eric Doninger [Brown-Forman Corporation](#)
Sam Farrant [Smart Spaces](#)
Linda Foggie [OfficeSpace Software](#)
Eleanor Forster [CXAI](#)
Matt Fox [Eptura](#)
Cameron Gagne [Embrava](#)
Marisa Galioto [JPMorgan Chase](#)
Hilary Green [Scotiabank](#)
Suzanne Heidelberger [NYU](#)
Kim te Kaat [Vecos](#)
Phil Kirschner [PK Consulting](#)
Elizabeth Leath [BlackRock](#)
Dinesh Malkani [Smarten Spaces](#)
Nicole Mangarella [SPS](#)
Melissa Marsh [Plastarc](#)
Kasia Maynard [WORKTECH Academy](#)
Robert Morelli [HSBC](#)
Sunita Pachova [Eptura](#)
Michele Passalacqua [M Moser Associates](#)
Philip Ross [UnWork](#)
Raquel Sachser [M Moser Associates](#)
Khurram Sheikh [CXAI](#)
Kate Thatcher [Architecture Plus Information \[A+I\]](#)
Haley Wilcox [ezCater](#)



Elizabeth Leath, BlackRock



Robert Morelli, HSBC



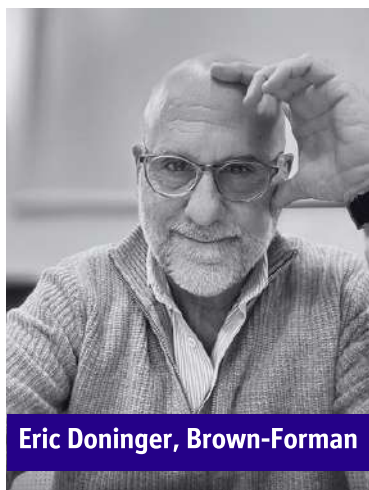
Andrew Burdick, Macquarie



Kelcia Azevedo, Macquarie



Philip Ross, UnWork



Eric Doninger, Brown-Forman



Hilary Green, Scotiabank



Jian Bland, Mastercard



Marisa Galioto, JPMorgan

SESSION HIGHLIGHTS



The future of work and the workplace is on everyone's agenda. This event brings thought leaders together to share cutting edge ideas on the future, from both a people, place, and technology perspective. It will allow an understanding of the key drivers of change and enablers of innovation that will shape how, where and when work takes place.

Key themes we will be discussing at this event include:

KEY THEMES

THE NEXT-GEN FINANCIAL WORKPLACE

BUILDING PURPOSEFUL WORKPLACES

DATA-DRIVEN DECISION MAKING

TRANSFORMING EX THROUGH
TECHNOLOGY AND SMART SOLUTIONS

The Next-Gen Financial Workplace: Innovation, Sustainability, and Experience

From global workplace trends to HSBC's innovative Hudson Yards HQ, this theme explores how cutting-edge office design, smart technologies, and sustainability initiatives are shaping the next generation of workplaces. Sessions highlight how leading organizations are rethinking the workplace to foster collaboration, enhance employee experience, and future-proof their work environments.

Building Purposeful Workplaces: Culture, Collaboration, and Human-Centric Design

Beyond office attendance policies, financial workplaces must create environments that attract talent, foster collaboration, and strengthen company culture. This theme delves into experience-driven workplace design, hybrid work strategies, and AI-powered solutions that enhance employee engagement. Examine how leading firms are shaping the future of work through innovation and human-centric design.

Data-Driven Decision Making: From Insights to Impact

With workplace data more accessible than ever, this theme explores how financial leaders can transform data into actionable strategies. Sessions cover emerging workplace metrics, the role of AI, and how organizations can optimise real estate, enhance employee experiences, and maximise the ROI of digital investments.

Transforming EX Through Technology and Smart Solutions

As workplaces evolve, creating seamless, tech-enabled experiences is key to enhancing employee satisfaction and operational efficiency. This theme explores innovations in workplace access, digital transformation, and AI-driven solutions that improve engagement. From Apple's vision for frictionless entry to transformative employee experiences in financial services, these sessions highlight how organizations can integrate technology to create smarter, more connected workplaces.



Inside HSBC's Hudson Yards HQ Vision: A Collaborative Approach to Sustainable, Smart and Engaging Workplaces
Robert Morelli, Head of Corporate Services USA, HSBC / Grant Christofely, Director, Workplace Strategy, M Moser Associates / Raquel Sachser, Design Director, Co-Head of Office, M Moser Associates / Michele Passalacqua, Senior Sustainability Specialist, M Moser Associates

In this session, leaders from HSBC and M Moser discuss the collaborative approach behind the building's cutting-edge design and workplace strategy, highlighting its sustainability, smart technologies, and experience-driven innovations. Discover how these elements come together to create a modern, sustainable workspace that supports HSBC's vision for the future of work.

Harnessing Design as a Strategic Tool: Macquarie Group's Americas HQ at 660 Fifth Avenue

Andrew Burdick, Global Design Director, Workplace Strategy and Design, Macquarie / Kate Thatcher, CEO, Architecture Plus Information (A+I)

Join Andrew and Peter as they share insights on Macquarie Group's recent Americas HQ project at 660 Fifth Avenue in New York, building upon Macquarie's trajectory of workplace strategy and developments over the last 15 years, and highlighting how design and design thinking plays a strategic role in both supporting Macquarie's entrepreneurial culture and meeting its commercial goals.



Expert Panel: Navigating the Data Dilemma - From Information to Action
Melissa Marsh, Founder and Executive Director, Plastarc / Kelcia Azevedo, Regional Head of Corporate Real Estate - Americas, Macquarie / Hilary Green, Director, Change Management and Platform Lead, Ways We Work and Where, Scotiabank / Linda Foggie, Director Board of Directors, OfficeSpace Software

In a data-rich world, how can financial workplace leaders extract truly actionable insights to optimize real estate and elevate the employee experience? This session will explore best practices for framing and benchmarking data, building frameworks, and integrating quantitative and qualitative insights to create a holistic view of workplace performance. Panellists will discuss emerging metrics and innovative measurement techniques that go beyond traditional KPIs, enabling organizations to make data-driven decisions that improve productivity, engagement, and long-term workplace effectiveness.



08:30 | CONFERENCE OPENS

09:00 | CHAIRPERSON'S OPENING REMARKS

Robert Morelli, Head of Corporate Services USA, HSBC



Suzanne Heidelberger, Global Real Estate, Workplace Experience, Portfolio Strategy, Suzanne Heidelberger Advisory and Adjunct Professor, NYU Schack Institute of Real Estate



09:10 | HSBC WELCOME ADDRESS



09:15 | THE FUTURE OF WORK: INNOVATIONS AND TRENDS

Philip Ross, Futurologist, Founder and CEO, UnWork



Join Philip for a deep dive into international workplace innovation, featuring ground-breaking examples from leading global organisations that have created innovative new HQs, like Booking.com in Amsterdam and Lego in Billund, as well as emerging technologies and trends transforming work.

09:35 | HSBC HUDSON YARDS SPOTLIGHT

Robert Morelli, Head of Corporate Services USA, HSBC



This session explores the vision and story behind HSBC's innovative Hudson Yards headquarters, where cutting-edge design meets sustainability to enhance workplace experience and employee wellbeing.

09:45 | INSIDE HSBC'S HUDSON YARDS HQ VISION: A COLLABORATIVE APPROACH TO SUSTAINABLE, SMART AND ENGAGING WORKPLACES

Robert Morelli, Head of Corporate Services USA, HSBC / Grant Christofely, Director, Workplace Strategy, M Moser Associates / Raquel Sachser, Design Director, Co-Head of Office, M Moser Associates / Michele Passalacqua, Senior Sustainability Specialist, M Moser Associates



This session explores the collaborative approach behind the building's cutting-edge design and workplace strategy, highlighting its sustainability, smart technologies, and experience-driven innovations. Experts will share insights on the integration of user-centric technology and space design, with a strong focus on enhancing employee wellbeing. Discover how these elements come together to create a modern, sustainable workspace that supports HSBC's vision for the future of work.

10:20 | INTERACTIVE AUDEINCE DISCUSSION



10:30 | NETWORKING & COFFEE BREAK

11:10 | REIMAGINING FINANCIAL WORKPLACES: INNOVATIONS IN EXPERIENCE DESIGN

Philip Ross, Futurologist, Founder and CEO, UnWork / Elizabeth Leath, Vice President, Workplace Experience Operations, Enterprise Services, BlackRock / Marisa Galioto, Head of Workspace Product, JPMorgan Chase / Jian Bland, Vice President, Workplace Experience, Mastercard

Join industry experts to explore how strategic workplace and experience design fosters collaboration, attracts talent, and drives innovation in NYC's financial sector. Gain insights on agile workspaces, employee experience, user journeys and lessons learned from key projects.



11:40 | BEYOND ATTENDANCE: CRAFTING WORKPLACES THAT DRIVE COLLABORATION, CULTURE, AND RETENTION

Eric Doninger, Vice President, Global Director of Real Estate & Workplace Strategies, Brown-Forman Corporation
Nicole Mangarella, Head of Global Technology & Innovation – Enterprise Workplace Solutions, SPS / Haley Wilcox, Director of Partnerships, ezCater / Sam Farrant, Smart Workplace Consultant, Smart Spaces

The hybrid landscape is evolving beyond simply setting office attendance policies to creating environments that maximize the value of in-person collaboration. This panel will explore how financial services leaders are crafting thoughtful hybrid structures that attract employees to the office and retain top talent. Drawing on data-driven insights, we'll discuss how creating a community-focused office environment—leveraging elements like food, connectivity, and culture—encourages models that prioritize employee experience and fruitful interactions, driving both individual and organizational growth.



12:10 | THE IMPACT OF AI AT THE WORKPLACE - POWERED BY SPACEONAI

Dinesh Malkani, CEO & Founder, Smarten Spaces



12:15 | WORKPLACE TECHNOLOGY IS THE NEW BEAN BAG CHAIR

Cameron Gagne, Director of Marketing and Communication, Embrava



12:20 | INTERACTIVE AUDIENCE DISCUSSION



12:25 | NETWORKING & LUNCH BREAK

13:25 | HARNESSING DESIGN AS A STRATEGIC TOOL: MACQUARIE GROUP'S AMERICAS HQ AT 660 FIFTH AVENUE

Andrew Burdick, Global Design Director, Workplace Strategy and Design, Macquarie / Kate Thatcher, CEO, Architecture Plus Information (A+I)

Join Andrew and Peter as they share insights on Macquarie Group's recent Americas HQ project at 660 Fifth Avenue in New York, building upon Macquarie's trajectory of workplace strategy and developments over the last 15 years, and highlighting how design and design thinking plays a strategic role in both supporting Macquarie's entrepreneurial culture and meeting its commercial goals.



13:55 | EXPERT PANEL: NAVIGATING THE DATA DILEMMA - FROM INFORMATION TO ACTION

Moderator: Melissa Marsh, Founder & Executive Director, PLASTARC / Kelcia Azevedo, Regional Head of Corporate Real Estate - Americas, Macquarie / Hilary Green, Director, Change Management and Platform Lead, Ways We Work and Where, Scotiabank / Linda Foggie, Director Board of Directors, OfficeSpace Software

In a data-rich world, how can financial workplace leaders extract truly actionable insights to optimize real estate and elevate the employee experience? This session will explore best practices for framing and benchmarking data, building advanced frameworks, and integrating quantitative and qualitative insights to create a holistic view of workplace performance. Panellists will discuss emerging metrics and innovative measurement techniques that go beyond traditional KPIs, enabling organizations to make data-driven decisions that improve productivity, engagement, and long-term workplace effectiveness.



14:25 | GLOBAL WORKPLACE FLEXIBILITY INDEX

Kim te Kaat, **Director of Sales, North America & Global Strategic Clients, Vecos** / Kasia Maynard, **Head of Research and Editorial, WORKTECH Academy**



This presentation, based on an upcoming Vecos report in partnership with WORKTECH Academy, reveals key highlights from the new global workplace flexibility index. This Index, based on billions of smart locker data points, independent research and expert insights, reveals how organisations can action on KPIs that matter, to "right-size" their workplaces to balance space efficiency, facility time and employee experience.

14:45 | FROM DATA TO DOLLARS: MAXIMIZING ROI FROM YOUR DATA & DIGITAL INVESTMENTS

Sunita Pachova, **Enterprise Account Executive, Eptura** / Matt Fox, **Vice President of Product Management, Eptura**



The financial workplace is at an important crossroads, where the digital investments made today can either become a liability or a powerful driver of growth. This session provides a comprehensive playbook for transforming workplace data and worktech investments into tangible ROI — including best practices and strategies from leading financial institutions. Through expert insights and practical examples, we will explore how you can turn your workplace data into a strategic asset and position your organization for success in 2025.

15:15 | NETWORKING & COFFEE BREAK

15:45 | ACCESS GRANTED. HOW EMPLOYEE BADGE IN APPLE WALLET POWERED BY SWIFTCONNECT MAKES OUR WORKPLACES SMARTER, SAFER, AND MORE ENJOYABLE

Brandon Arcement, **Chief Commercial Officer, SwiftConnect**
Plus guest speaker



There's a smarter way to access workplaces. As enterprises adopt mobile-first identity solutions, they enhance convenience while ensuring security. Join Brandon Arcement, Chief Commercial Officer at SwiftConnect, and a Special Guest to explore Employee Badge in Apple Wallet and how cloud-enabled connected access streamlines entry, expands experiences, and improves efficiency—creating frictionless, future-ready workplaces.

16:10 | TRANSFORMATIVE EMPLOYEE EXPERIENCES IN THE FINANCIAL SERVICES MARKET

Khurram Sheikh, **Chairman & CEO, CXAI** / Eleanor Forster, **Global Strategic Account Director, CXAI** / Additional speakers to be announced



Join industry leaders as they explore strategies for creating more engaging, efficient, and employee-centric workplaces. Panellists will share real-world experiences, highlighting what's working, what's not, and the key challenges they face. CXAI will showcase data and AI-driven solutions that improve employee experiences, while experts discuss emerging trends and predictions for 2025, offering a vision for the future of workplace innovation.

16:35 | KNOWLEDGE EXCHANGE & REFLECTIONS



Phil Kirschner, **Future of Work Expert, Principal Consultant, PK Consulting**

16:50 | CHAIRPERSON'S CLOSING REMARKS

Robert Morelli, **Head of Corporate Services USA, HSBC**



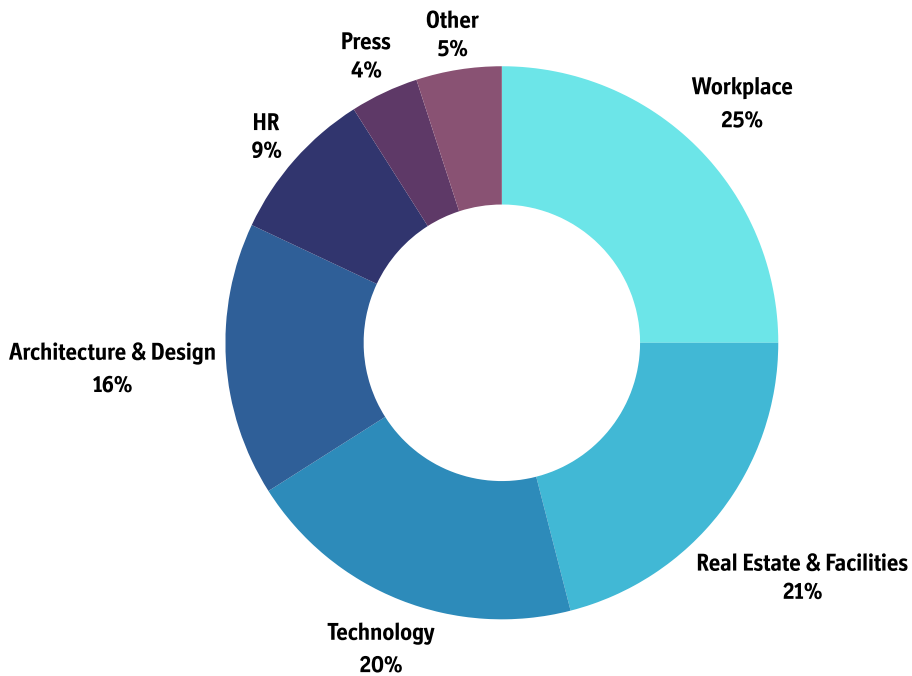
Suzanne Heidelberger, **Global Real Estate, Workplace Experience, Portfolio Strategy, Suzanne Heidelberger Advisory and Adjunct Professor, NYU Schack Institute of Real Estate**



17:00 | CONFERENCE CLOSES

WHO ATTENDS

Attracting senior level professionals from Workplace, CRE, IT, HR and Architecture & Design



A well-spoken and experienced group of presenters providing leading edge subjects current topics and statistics. A great place to learn about new ideas.

WORKTECH DELEGATE, DELOITTE



Informative, interesting views on workplace design, planning technology and workers



WORKTECH DELEGATE, BANK OF MONTREAL



BOOK NOW

www.worktechevents.com/events/worktech25-financial-workplace-new-york/

KEY INFORMATION

When: Thursday, February 27th 2025

Where: HSBC, The Spiral, Hudson Yards, New York

How to book:

Visit: www.worktechevents.com/events/worktech25-financial-workplace-new-york/

Offer a Special Rate to Your Network!

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If you are part of a group that would like to attend and are looking for a joint group rate please get in touch to arrange a bespoke ticket price.

Become a WORKTECH Ambassador

We're looking for people that love the future of work and the workplace and social media. People who are willing to become part of our team and help spread the word to the masses. There will be a free event ticket available to successful applicants.

For more information on the above initiatives, please contact:

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