



Product, Technology & InfoSec/Ops All-hands Offsite Event

September 10-11, 2025

© 2025 eMoney Advisor, LLC. For internal purposes only.

2025 Prod/Tech/InfoSec Offsite Event

eMoney Event Date: September 10-11, 2025

- Wednesday 9/10 breakfast starting at 7:00 AM
 - Keynote speakers
 - Mini-conference breakout sessions, Charitable Giving event
 - Team outings in the evening
- Thursday 9/11 breakfast starting at 7:00 AM
 - Morning: Yoga/Meditation (7:00 AM), Hack-a-thon presentations, demos and awards!
 - Afternoon (1:00-5:00 PM): Picnic at Normandy Farm, Charitable Giving event, Cornhole tournament and prizes!

Product Mgmt/Technology/InfoSec All-hands & Mini-Conference

Day 1 - September 10																					
7:00-8:45		8:45-9:00		9:00		10:00		11:00		12:00		1:00		2:00-2:30		2:30-3:30		3:30-4:30		4:30-7:00 PM	
Grand Ballroom	Hot Breakfast @ Farmers Daughter Restaurant	Kickoff/Intros/ Logistics	Keynote speaker: Philip Walsh Gartner Director Analyst	Room 1: Birch	MS Github Copilot session	Techie Book Club	Grand Ballroom Lunch	Keynote speaker: Vikram Elango AWS Sr. AML Specialist SA	Break/Charitable Giving	Room 1: Birch	MS Github Copilot session	Context is a LIE!	Team Outings								
				Room 2: Cedar (classroom style)	From Chaos to Consistency: Our Design System (Kyber) Explained	Green lights and green fields: exploring agility and development in a lawless land				Room 2: Cedar (classroom style)	No Hard Feelings	Everyone Is A Designer (Yes, Even You)									
				Room 3: Cherry	Investing in You: A Deep Dive into Total Rewards:	Breaking (and Fixing) the Bank: A Deep Dive into Parser Engineering				Room 3: Cherry	Gen-AI Agents: Your Invisible Team for Faster, Smarter Development	Moving Monte Carlo to EKS									
				Room 4: Hawthorn	Solving the AI Paradigm for QA	Semver or How I Learned to Stop Worrying and Love the Chageset				Room 4: Hawthorn	Between Launches and Burnout: The Tech Lead Tightrope: Roundtable Discussion – For Current and Former eMoney Tech Leads	User Perspective Session: What would we say <i>we do</i> here?									
				Room 5: Hickory	Strengthen your frontend development fundamentals by learning about an oft neglected aspect of HTML: semantic HTML	Vibe coding and spec-driven development with Copilot.				Room 5: Hickory	Mixpanel Insights	CINDER: Analyzing Configuration Data for a New Way Forward									
				Room 6: Oak	Financial Planning Industry Trends and Tidbits	Prompt Engineering & AI Agents				Room 6: Oak	Nexus for Dummies!	AI Committee: Progress & Next Steps									
				EEC Charitable Giving Volunteer Event																	
Day 2 - September 11																					
7:00-7:45 AM		7:00-8:45		8:45-9:00		9:00		10:00		11:00		12:00		1:00		2:00		3:00		4:00	
Yoga & Meditation: Maya Verma	Grand Ballroom	Hot Breakfast @ Farmers Daughter Restaurant	Day 2 Kickoff	Hack-a-thon presentations, demos and awards!										Picnic Event @ Normandy Farm/ EEC Charitable Giving Volunteer Event							

Reminders:

General Session Zoom Info (in Outlook invitations)

- Day 1:
 - **Meeting URL:**
<https://emoneyadvisor.zoom.us/j/97723713552?pwd=nVeZkWJcW9Pvs5HcEwWCzJ3v5cdVn0.1&from=addon>
 - **Meeting ID:** 977 2371 3552
 - **Passcode:** 937022
- Day 2:
 - **Meeting URL:**
<https://emoneyadvisor.zoom.us/j/99034576651?pwd=qlB7pACJx3FSPYBzf5DCSACaljSSTq.1&from=addon>
 - **Meeting ID:** 990 3457 6651
 - **Passcode:** 126375

Product, Technology, Information & Security: 2025 event digital brochure

- Be sure to check-in at the registration desk for both days
- Normandy Farm Conference **WIFI:**
 - SSID: Conference
 - Password: Conference.2025
- First come first serve for mini-conference sessions
 - **Canceled:** 11:00 AM "Prompt Engineering & AI Agents" session in the Oak room
- Free hotel parking
- Catch a ride with a colleague for local events or Uber

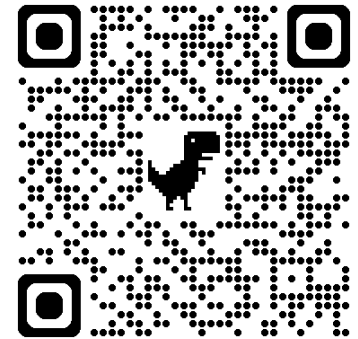
Volunteer & Giving Opportunity Benefitting One House at a Time

The EEC is thrilled to be partnering with OHAAT to help end **child bedlessness in Greater Philadelphia**

How to participate:

- **Drop-in** to the Silos ballroom for 30 minutes or more to create bedding packages (*no experience necessary!*)
- Clean out bookshelves, linen closets, and toy chests and **bring in/donate** new or gently used bedding, children's/YA books, and stuffed animals
- **Log into** NetBenefits/Workplace Giving to make an eMoney matched* donation to OHAAT (EIN: 23-3046871)!
- For remote attendees: email EEC@emoneyadvisor.com with Target, Walmart, Amazon gift card donations for supplies

*For additional information, please stop by the Silos ballroom and speak with an EEC team member



And coming soon...

Extra Life Gaming Event Benefitting Children's Miracle Network

- Join the eMoney Extra Life team (VTO!)
- Board games, online or video games, and/or outdoor games
- Raise money to directly support your local Children's Miracle Network Hospital!

Save the Date: November 7th

For questions, email EEC@emoneyadvisor.com



| New Hires, Promotions and EEA Awards (to date)

Welcome New Hires



Benjamin Aronow
Associate Software
Engineer



Mingle Li
Associate Software
Engineer



Scott Mota
Sr. Agile Program
Operations Specialist



Len Damico
Advisory Product
Designer



Chinedu Obiakara
Advisory Software
Engineer



Gavin Busath
Advisory Product
Designer



Diego Berrones
Associate Software
Engineer



Leah Jorge
Associate Software
Engineer

Welcome New Hires



Alicia Lukose

Co-Op Software Engineer



Mia Yim

Co-op Software Engineer



Max Bolz

Co-op Software Engineer

Ryan Anwar, Co-op Software Engineer

Shireen Kumar, Co-op Software Engineer

Tanmay Demble, Co-op Software Engineer

Jonathan Diaz, LBS QA Engineer Contractor



Kyle Fox

Senior Technical Support Engineer
Client Services

2025 Promotions



Ryan Fransen-Pruden
QA Automation
Engineer



Richard Mangra
Sr. Software Engineer



Joel Barruos
Advisory Software Engineer



Joshua Eisen
VP, Enterprise Architecture



Wesley Hansen
Advisory Software Engineer,
Tech Lead



Joseph Mongan
Sr. Advisory Software Engineer,
Tech Lead



Bill Staffeldt
Advisory Software Engineer,
Tech Lead



Tom DeFelice
Sr. QA Analyst

2025 Promotions



Tom Lewis

Sr. Advisory Software Engineer



Frank Palazzo

Advisory Product Owner



Maya Verma

Advisory QA Analyst



Cristina Zalucky

Advisory Software Engineer,
Tech Lead



Chad Walling

Sr. Advisory Software Engineer,
Tech Lead



Sebastian Baetz

Software Engineer



Joshua Belfiore

Director, Product Management
Advisor Experience



Angela Gilson

Sr. Desktop Support
Engineer

eMoney



Welcome New Hires (FMRI)

Subhalakshmi Chellakumar – Software Engineer

Yasar Arafath M – Software Engineer

Dhineshkumar Rengasamy – Software Engineer

Balakumar J – Sr. Software Engineer

Elavarasan V – Software Engineer

MohanaSundaram V – Software Engineer

Mohamed Rizwan S – Software Engineer

Kanthavel Ramkumar – QA Engineer



Welcome New Hires (FMRI)

Ranjith V – Software Engineer

Rashmi LNU – Software Engineer

Saravanan Babu – Software Engineer

Deenadhayalan S – Software Engineer

Naveen Kumar A – Software Engineer

Muthuselvi M Murugesan – Software Engineer

2025 Promotions to date (FMRI)



Sreenath MS
Lead Software Engineer



Special Guests from FMRI

PradeepRaj Thiyagarjan – Development Manager

Shylander P – Software Engineer, Tech Lead

Muhilan J – Product Owner

EEA Awards & Recognition – Jan to June 2025

eMoney Excellence Award Team winners:

Auth Team – Successfully migrated EMX users to Okta hosted sign in and extended the experience to mobile, enhancing security, reducing costs and accelerating development through cross-team collaboration and technical excellence. Shout out to the team: Christina Hurr, Kren Mattox, Andrew Gilliland, Andrew Eaton, Alex Yarashevich, William Gunn

Odin Team - Drove key modernization initiatives, including decoupling Nexus from monolith architecture, containerizing workers, upgrading to .NET 8, and resolving critical incidents-accelerating cloud readiness, improving scalability, and enhancing client satisfaction through exceptional cross-functional collaboration. Shout out to the team: Chris Harvey, Tim Puglia, Andrew Law, Colin Moore, Ilia Koulikov, Jonathan Morales, Luke Sheaffer, Sean Gregory, Priya Pamayyagari, Keith Pipher, Don Senna



EEA Awards & Recognition – Jan to June 2025

eMoney Excellence Award Team winners:

QA Performance Test Team - Drove cost savings and scalability by migrating to Akamai Cloud Test, supporting the Vegas shutdown, and continuously delivering high-impact performance testing across modernization efforts, all while saving \$50,000 annually and expanding testing capacity. Shout out to the team: Tray Savage, Jacquan Long, Michael Dwyer

Data Migration Team – Improved how external data from competitors is migrated into eMoney, starting with MoneyGuidePro then moving on to Right Capital and others. Shout out to the team: Antonio White, Brittany Loro, Shawn Steck, Veronica Bergey

Justin Brydges & Jeff Shaver – By migrating FMRI VDR's to Windows 365 Cloud PC's, Justin and Jeff delivered a modern, cost-effective solution that saved over \$650K, enhanced developer performance, ensured legal compliance, and enabled a smooth exit from Fidelity's India data center.



EEA Awards & Recognition – Jan to June 2025

Individual Winners:

Sean Donovan
Megan K. Murphy
Jay Jackson
Madeleine Schulz
Andrew Gilliland
Luke White
Jay Canha
Daniel Eck
Diane Kelly
Chris Mauriello
Devin Eldreth

Individual Winners:

Spencer Drager
Haythem Shihadeh
Dave Ferrier
Doug Dinwoodie
Dave Newhard
Ellie Jani
Jenn Rock
Shannon Yeagley
Andrew Guenther
Chris Grant
Megan Thompson



eMoney



| Keynote Speaker

Keynote Speaker: Philip Walsh

- Director Analyst in Gartner's Software Engineering Practice
- PhD in Philosophy and former college professor

Initiatives: Software Engineering Practices; Adopt Modern Architectures and Technologies; Build a World-Class Software Engineering Organization



Recent Publications:

- The Concept of Motivation in Merleau-Ponty: Husserlian Sources, Intentionality, and Institution
- Data Stewardship: A Letter to Computer Vision from Cultural Heritage Studies
- Intercorporeity and the First-Person Plural in Merleau-Ponty

eMoney



| Keynote Speaker

Keynote Speaker: Vikram Elango

Sr. GenAI Specialist Solutions Architect at AWS

- Generative AI and its potential impact in financial services
- Key Macro Trends in AI Business focused
- Top Use Cases for Generative AI in Financial Services
- Key Technology Trends Enabling Generative AI
- Framework for AI Adoption in Financial Services
- Key takeaways

