



Chair's Address

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2017 - 2018 Goals



Content

- Regulatory Initiatives
- Technology Changes



Membership

- Increase by 5%
- Global Collaboration



Leadership

- Board
- Meeting Structure



Accomplishments

Content	Membership	Leadership
<ul style="list-style-type: none">• Regulatory Initiatives<ul style="list-style-type: none">• Margin & Collateral Market Practice• T+2• MiFID II• IRS 871m• Technology Changes<ul style="list-style-type: none">• DLT• Artificial Intelligence• Machine Learning• API's	<ul style="list-style-type: none">• Increase by 5%<ul style="list-style-type: none">• ☹️ Decrease in Membership by 4%• Defining membership outreach strategy• Improve data• Global Collaboration<ul style="list-style-type: none">• ISITC Europe• FIA• SIFMA AMG• SMPG	<ul style="list-style-type: none">• Board<ul style="list-style-type: none">• Two Directors step down• Add one Director in Q3 2017• Officer updates• Four Directors added in 2018• Meeting Structure<ul style="list-style-type: none">• Omitted West Coast meeting• Reviewing Agenda structure



Beginning a New Chapter

“By **changing** nothing, nothing changes.”
~ Tony Robbins



“After you've done a thing the same way for two years, look it over carefully. After five years, look at it with suspicion. And after ten years, throw it away and start all over.”
~ Alfred Edward Perlman



SWOT and Brand Analysis





Strengths

- Community of SME's
- Market Practice creators
- Collaboration via Network of financial services professionals



Weaknesses

- Narrow Mission Statement
- Content Redundancy
- Perceived reluctance to change organizationally



Opportunities

- Guide industry through FinTech revolution
- Leverage Network to facilitate interaction at events
- Develop partnerships with compatible organizations



Threats

- Being left behind in the industry
- Outsourcing/shrinking industry creates diminished membership
- Budget constraints



Key Recommendations

- ▶ Redefine Mission Statement
- ▶ Highlight ISITC Work
 - Interviews
 - Press Releases
 - Social Media



Financial Services Disrupted: Navigating Change



“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.”

~ Bill Gates