

DAKOTA · IN CONVERSATION

Why We Created the First Dakota Data Summit — A Conversation with Dakota's Leadership Team

Dakota CEO Gui Costin, President Rob Robertson, and Head of Product Pat Tighe sit down to talk about the most important event Dakota has ever hosted — why it exists, what it represents, and why the conversation about data, AI, and distribution has never mattered more.

GC **Gui Costin**
CEO & Founder, Dakota

RR **Rob Robertson**
President, Dakota

PT **Pat Tighe**
Head of Product, Dakota

April 20
DATE OF SUMMIT

2300 Chestnut
PHILADELPHIA, PA

Gui Costin, Rob Robertson & Pat Tighe · CEO, President & Head of Product, Dakota · Published March 2026

10 Speakers

FROM LEADING FIRMS

4 Panels

PLUS NETWORKING RECEPTION

— THE AGENDA — DAKOTA DATA SUMMIT · APRIL 20

A Full Day Built Around the Questions That Matter Most in Distribution, Data, and AI

Welcome & Opening Remarks

Gui Costin, CEO, Dakota & Priya Stanley — On the AI moment in asset management: what's real, what's hype, and what it means for distribution teams today

Panel 1 — Building the Data Infrastructure Behind Distribution

Hosein Yeh, PIMCO · Matthew Gordon, Clark Capital · Alejandra Bacon, Apollo

Panel 2 — Sales Enablement at Scale

Michelle Liller, Lazard · Lindsey Bulger, Nomura · Joe Stewart, GQG

Panel 3 — The Private Markets Distribution Machine

Brent Kraeger, Blackstone · Krista Bowers, Future Standard

Panel 4 — Where Data & Distribution Are Headed

Paul Maloney, State Street · Alejandra Bacon, Apollo · Sean Dougherty, Hartford Funds

Networking Reception

Continued conversations among practitioners, leaders, and the Dakota team

Gui Costin, Rob Robertson & Pat Tighe

CEO, President & Head of Product, Dakota · Published March 2026

S

omething has shifted in asset management. The conversations that used to happen quietly inside firms — about CRM adoption, about data infrastructure, about how AI might reshape distribution — have moved from the periphery to the center of how serious organizations think about competing. The role of data in distribution is no longer a back-office consideration. It is a strategic one. And the professionals leading those efforts — the heads of data, the heads of sales enablement, the CTOs of distribution-focused firms — are some of the most consequential people in the industry right now.

Dakota has been in the business of building data and intelligence tools for the investment management industry for nearly three decades. We have watched this shift happen in real time — and we decided it was time to do something about it. On April 20, at 2300 Chestnut Street in Philadelphia, we are hosting the first Dakota Data Summit: a full day of structured conversation among practitioners tackling the data, AI, and distribution questions that matter most right now.

We sat down with Gui Costin, Rob Robertson, and Pat Tighe to talk about why we created it, what we hope it produces, and why we believe the moment we are in — for data, for AI, and for distribution — is one that demands exactly this kind of gathering.

PART ONE
SECTION 01

Why We Created the First Dakota Data Summit

GC GUI COSTIN — CEO, DAKOTA

Rob, let's start with the origin of this idea. What was the conversation that made us say — we need to create a summit, and we need to do it now?

RR ROB ROBERTSON — PRESIDENT, DAKOTA

Honestly, it came from a feeling of urgency that has been building for a while. In the last two to three years, the conversations we have been having with distribution leaders, heads of sales enablement, and analytics professionals across the industry have changed character completely. It used to be that data was a supporting function — something that sat behind the distribution team and produced reports. Now it is becoming the distribution strategy itself. The firms that are winning in fundraising and in sales are the ones that have built real data infrastructure, adopted AI thoughtfully, and made their CRM systems and analytics tools things that their teams actually use and rely on.

The problem is that those conversations are happening in isolation. Every firm is working through the same questions — how do you get CRM adoption at scale, what does an AI-ready data stack actually look like, how do you measure the ROI of sales enablement investment — but they are doing it alone, without the benefit of hearing how their peers are approaching the same problems. We thought: there should be a room where those conversations happen together. So we decided to build it.

GC GUI COSTIN — CEO, DAKOTA

Pat, from a product standpoint — we are building data and AI tools every day at Dakota. What did you see in the market that convinced you this event needed to happen?

PT PAT TIGHE — HEAD OF PRODUCT, DAKOTA

What I kept seeing was a gap between the pace of change and the pace of shared understanding. AI is moving extraordinarily fast. The tools available to distribution teams today — for intelligence, for automation, for personalization, for analytics — look completely different than they did even eighteen months ago. But the frameworks for thinking about how to use those tools, how to evaluate them, and how to integrate them into existing workflows are still catching up. Most firms are making decisions about significant technology investments based on very limited information about what is actually working in comparable organizations.

The Dakota Data Summit is an attempt to accelerate that shared understanding. When you put top asset managers across private markets, traditional equities and fixed income in a room together talking about how they have built data infrastructure for distribution — that conversation produces insight that no conference presentation or industry report can replicate. Practitioners talking to practitioners, specifically about the decisions they have actually made and what the outcomes have been. That is what we are trying to create.

“““

Every firm is working through the same questions about data, AI, and distribution — but doing it alone, without the benefit of hearing how peers are approaching the same problems. We decided to build the room where those conversations happen together.

ROB ROBERTSON — PRESIDENT, DAKOTA

GC

GUI COSTIN — CEO, DAKOTA

Why now specifically? The industry has been talking about data and AI for years. What makes April 2026 the right moment for this conversation?

RR

ROB ROBERTSON — PRESIDENT, DAKOTA

Because we have moved from the theoretical to the operational. Two years ago, the conversation was mostly about what AI might do to asset management. Today, it is about what AI is actually doing — in real distribution organizations, running real workflows, with real results. The firms that got serious about data infrastructure early are now seeing the payoff. The firms that waited are starting to feel the distance growing. This is the moment where the decisions organizations make about data and AI are going to determine where they are competitively in three to five years. The urgency is real and it is present tense, not hypothetical.

PT PAT TIGHE — HEAD OF PRODUCT, DAKOTA

I would add that the opening conversation at the summit — what Gui and Priya Stanley will lead on the AI moment in asset management — is specifically designed to cut through the noise on exactly this question. There is a lot of hype in this space right now. A lot of vendors making extraordinary claims. A lot of fear about what AI will displace and a lot of breathless enthusiasm about what it will unlock. What distribution leaders actually need is a grounded, honest assessment of what is real and actionable right now versus what is still two or three years away from being genuinely practical at scale. That is the conversation we are opening with — and it sets the tone for everything that follows.

PART TWO
SECTION 02

Why the Head of Data Is Now a Mission-Critical Role in Asset Management

GC GUI COSTIN — CEO, DAKOTA

One of the themes running through everything we are doing at this summit is the idea that the head of data — or whatever you call the role at a given firm — has gone from a nice-to-have to a mission-critical position. Rob, make that case. Why is this role now so important?

RR ROB ROBERTSON — PRESIDENT, DAKOTA

Think about what distribution leadership used to look like. The head of sales ran the sales team. The head of marketing ran the marketing team. Data was something that the CRM administrator managed and the analysts pulled reports from. Data strategy, to the extent it existed, was a technology conversation that happened separately from the business conversation.

That separation is no longer viable. The decisions about what data to collect, how to structure it, how to integrate it across CRM and analytics and client reporting systems, and how to make it actionable for the people who are actually in front of clients — those decisions now directly determine how effective a distribution organization is. A head of distribution who does not understand their data infrastructure is operating with a fundamental blind spot. And a firm that does not have someone whose primary responsibility is the quality and utility of its distribution data is falling behind the firms that do.

The head of data in a distribution context is the person who makes sure that when a wholesaler opens their CRM in the morning, the information they see is accurate, current, and organized in a way that helps them prioritize their day. That sounds operational, but the downstream effects — on conversion rates, on relationship depth, on the quality of the firm's understanding of its clients — are as strategic as anything in the business.

GC

GUI COSTIN — CEO, DAKOTA

Pat, you are building tools for exactly these people every day. What do the best heads of data in distribution organizations actually do differently from the rest?

PT

PAT TIGHE — HEAD OF PRODUCT, DAKOTA

The clearest difference I see is between the data leaders who see their role as a service function and those who see it as a strategic function. The ones who are truly excellent treat data the way a CFO treats capital — as a resource that needs to be allocated, managed, and put to work in the right places. They are not just answering requests for reports. They are proactively identifying the information gaps that are costing their distribution teams opportunities, and they are building the infrastructure to close those gaps before someone else asks for it.

Practically, what that looks like is a few things. First, they are obsessed with data quality — because a CRM full of bad data is worse than a CRM with no data, because bad data creates false confidence. Second, they understand the distribution workflow deeply enough to know what information actually changes behavior at the point of a client conversation, not just what looks interesting in a dashboard. Third, and this is increasingly important, they are thinking about how AI tools can amplify the intelligence their teams have, not just automate the tasks their teams do. Those are different things, and the best data leaders understand the distinction.

“““

The best heads of data treat data the way a CFO treats capital — as a resource that needs to be allocated, managed, and put to work in the right places. They are not answering requests for reports. They are proactively identifying the information gaps costing their teams opportunities.

PAT TIGHE — HEAD OF PRODUCT, DAKOTA

GC

GUI COSTIN — CEO, DAKOTA

Our speaker lineup reflects this directly. We have Hosein Yeh at PIMCO, Matthew Gordon at Clark Capital, Paul Maloney at State Street, Sean Dougherty at Hartford Funds. These are people sitting at the intersection of data, technology, and distribution at some of the most respected organizations in the industry. What do you expect the most valuable threads of conversation to be across those panels?

RR

ROB ROBERTSON — PRESIDENT, DAKOTA

I am most excited about the CRM adoption conversation, honestly. Every firm has a CRM. Very few firms have a CRM that their distribution teams actually use with discipline and consistency. The gap between having the tool and getting genuine adoption — at scale, across a large and distributed sales team — is one of the hardest operational problems in distribution, and it is one that the best data and sales enablement leaders have real, hard-won answers to. I expect Matthew Gordon's perspective from Clark Capital and the sales enablement panels to be particularly valuable there.

The private markets distribution conversation is another one I am watching closely. We have people who are going to be talking about something that is genuinely new — how you build distribution infrastructure for private market products at the kind of scale that the wealth channel now demands. That is a fundamentally different operational challenge from what traditional mutual fund or ETF distribution looks like, and I think a lot of attendees are going to learn something concrete from that panel.

SUMMIT SPEAKERS — THE PRACTITIONERS IN THE ROOM

Hosein Yeh	SVP Business Strategy & Analytics, PIMCO	PANEL 1 — DATA INFRASTRUCTURE
Matthew Gordon	CTO, Clark Capital	PANEL 1 — DATA INFRASTRUCTURE
Alejandra Bacon	Head of Sales Enablement, Apollo	PANEL 1 & PANEL 4
Michelle Liller	SVP Sales Enablement, Lazard	PANEL 2 — SALES ENABLEMENT AT SCALE
Lindsey Bulger	Head of Sales Enablement, Nomura	PANEL 2 — SALES ENABLEMENT AT SCALE
Joe Stewart	Sr. Director, Distribution Enablement & Analytics, GQG	PANEL 2 — SALES ENABLEMENT AT SCALE
Brent Kraeger	Managing Director, Private Wealth, Blackstone	PANEL 3 — PRIVATE MARKETS DISTRIBUTION
Krista Bowers	SVP Sales Strategy & Analytics, Future Standard	PANEL 3 — PRIVATE MARKETS DISTRIBUTION
Paul Maloney	Head of Markets Intelligence & Strategic Insights, State Street	PANEL 4 — WHERE DATA & DISTRIBUTION ARE HEADED
Sean Dougherty	COO Distribution, Hartford Funds	PANEL 4 — WHERE DATA & DISTRIBUTION ARE HEADED

PART THREE
SECTION 03

AI, Data, and Distribution — What's Real, What's Hype, and What Organizations Need to Do Now

GC GUI COSTIN — CEO, DAKOTA

The opening conversation at the summit is specifically about the AI moment — what is real and what is hype. Pat, you are building AI-powered tools at Dakota. What is your honest read on where we are?

PT PAT TIGHE — HEAD OF PRODUCT, DAKOTA

My honest read is that the capabilities are real and they are genuinely impressive — and simultaneously that many of the specific promises being made to distribution organizations right now are either premature or overstated. The underlying technology has made extraordinary strides. Large language models can do things that were simply not possible two years ago. The ability to query a complex database in plain English and get a precise, accurate answer — something Dakota's AI layer does every day — would have sounded like science fiction in 2022. That is real.

What is hype is the idea that AI can be dropped into a distribution organization without the underlying data foundation being in place first. AI does not fix bad data. It amplifies whatever data you have — which means if your CRM is incomplete, inconsistent, or out of date, an AI tool built on top of it will produce incomplete, inconsistent, and out-of-date insights faster than you could produce them manually. The firms that are getting the most out of AI in distribution are the ones that did the hard, unglamorous work of building clean data infrastructure first. That sequencing matters enormously, and it is something the summit is going to address directly.

GC GUI COSTIN — CEO, DAKOTA

Rob, what do you say to the distribution leader who is genuinely overwhelmed by how fast this is moving? The pace of change in AI is extraordinary. How do organizations keep up without making costly mistakes?

RR ROB ROBERTSON — PRESIDENT, DAKOTA

I think the first thing to say is that the overwhelm is legitimate. This is genuinely moving fast — faster than most technology cycles in the recent memory of most distribution professionals. The pace is not going to slow down. If anything, the compounding nature of AI development means the rate of change is likely to accelerate from here. Pretending otherwise does not help anyone.

What I tell distribution leaders is: you do not need to understand everything to act intelligently. You need to understand your specific workflows well enough to identify where better intelligence and automation would change your outcomes — and then evaluate tools against that specific need, not against the broadest possible AI vision. Start with the problem you actually have, find the solution that most directly addresses it, and build from there. The firms that get lost are the ones that start with the technology and work backward to find a use case. That is backwards. The firms winning are the ones that start with the sales process, identify the friction points, and ask: what data and AI tools would make this specific thing better?

“““

AI does not fix bad data. It amplifies whatever data you have. The firms getting the most from AI in distribution are the ones that did the hard, unglamorous work of building clean data infrastructure first. That sequencing matters enormously.

PAT TIGHE — HEAD OF PRODUCT, DAKOTA

GC GUI COSTIN — CEO, DAKOTA

The final panel is titled "Where Data and Distribution Are Headed." Paul Maloney from State Street, Alejandra Bacon from Apollo, Sean Dougherty from Hartford Funds — these are serious practitioners with a real view of the next five years. What do you think the most important things they are going to say are?

RR ROB ROBERTSON — PRESIDENT, DAKOTA

I think the most important thing that panel is going to surface is that the definition of a distribution team is changing. What it means to be a wholesaler, what it means to be a client service professional, what it means to be a sales leader — all of those job descriptions are being rewritten by data and AI in real time. The organizations that are thinking clearly about this are building for a distribution team that is smaller in some ways, more specialized in others, and dramatically more informed about their clients at every level than was possible five years ago.

The conversation about where the industry is headed is also fundamentally a conversation about competitive moats. The firms that build strong data infrastructure now — that invest in the tools, the talent, and the processes to make data genuinely useful across their distribution organizations — are building a compounding advantage. Their people know their clients better. Their decisions are more informed. Their resource allocation is more precise. That compounds over time in ways that are very difficult to close once the gap has opened. That is the most important thing I expect to come out of that final panel.

PT PAT TIGHE — HEAD OF PRODUCT, DAKOTA

The thing I am most curious about from that panel is the client expectation piece. The end clients of asset management distribution — the allocators, the advisors, the wealth managers — are also being exposed to AI and better data tools in their own practices. Their expectations of what personalization, responsiveness, and insight look like in a relationship with an asset manager are rising. The distribution organizations that can meet those rising expectations are going to have a structural advantage. The ones that cannot are going to find it increasingly difficult to hold relationships that used to be much stickier than they will be going forward.

PART FOUR

SECTION 04

Why You Should Be in the Room on April 20

GC GUI COSTIN — CEO, DAKOTA

Let's be direct. Who should be at the Dakota Data Summit — and what should they expect to take away?

RR ROB ROBERTSON — PRESIDENT, DAKOTA

Anyone whose work sits at the intersection of data, technology, and distribution in asset management. That includes heads of data and analytics, CTO and technology leaders at asset managers, heads of sales enablement and distribution strategy, distribution COOs, heads of marketing technology, and senior distribution leaders who want to understand what the data and AI conversation means for how they build and run their teams. If you are responsible for any part of how your firm uses information to compete for client relationships and capital — this day was built for you.

What you should expect to take away: at least two or three concrete things that are working at peer organizations that you are not currently doing. A clearer picture of where AI is genuinely useful in distribution right now versus where it is still maturing. And the beginning of relationships with a room full of practitioners who are working through the same challenges you are. Those relationships tend to be the most durable takeaway from days like this.

GC GUI COSTIN — CEO, DAKOTA

Final question to both of you. What does success look like for this summit — what would make you say, a month later, that we got it right?

PT PAT TIGHE — HEAD OF PRODUCT, DAKOTA

Success for me looks like the networking reception running forty-five minutes longer than planned because the conversations that started in the panels are still going. It looks like attendees exchanging contact information and committing to follow up on specific ideas that came up during the day. It looks like people leaving with a list of things they want to do differently in their organizations — not a vague sense that they learned something interesting, but actual, concrete next actions. If we produce that, we have done something worth doing.

RR ROB ROBERTSON — PRESIDENT, DAKOTA

For me, success is that we do this again next year — and the year after that — because the community that was in the room on April 20 found it valuable enough to come back. Dakota has been building for this industry for nearly thirty years. The Data Summit is an expression of our belief that education, community, and shared experience are part of what we owe the people we are building for. We are not just a data company. We are an organization that cares about the craft of distribution and about helping the people who do it for a living do it better. If the summit reflects that — and I believe it will — the answer to "did we get it right?" will write itself.

“““

Dakota has been building for this industry for nearly thirty years. The Data Summit is an expression of our belief that education, community, and shared experience are part of what we owe the people we are building for. We are not just a data company.

ROB ROBERTSON — PRESIDENT, DAKOTA

JOIN US

Join Us at the First Dakota Data Summit

A full day of practitioner-led conversation about data, AI, and the future of distribution in asset management. Structured panels, open dialogue, and the networking reception to follow.

- Date:** April 20, 2026
- Location:** 2300 Chestnut Street, Philadelphia, PA
- Format:** 4 Panels + Networking Reception
- Speakers:** PIMCO · Apollo · Blackstone · State Street · Lazard · Nomura · GQG · Hartford Funds · Clark Capital · Future Standard

» REGISTER NOW

LEARN MORE