

Panelist Bio for the October 28, 2021 Asset Management Advisory Committee Meeting

Mr. Jody Bhagat, Personetics

Jody has a unique combination of experiences in financial services: digital leadership roles at leading North American Banks, Partner with McKinsey, and President of Americas at an innovative AI-driven fintech. He has led digital and direct teams at U.S. Bank and Citizens Bank, earning awards such as #1 digital experience. At McKinsey, he helped financial institutions in North and South America define and execute digital transformation programs to drive customer growth. He currently operates as President of Americas at Personetics, a global leader in data driven personalization and customer engagement for Financial Institutions. Personetics delivers personalized insights, advice, and automated programs to customers based on their banking and wealth transaction data. Jody has an MBA from Northwestern University where he was an Austin Scholar, and a B.S. in Computer Engineering from The University of Michigan.