

Agenda

November 18, 2025

2:00 p.m. *10 min* Welcome by Lorie Logan, Seth Searls, and Dawn Fitzpatrick

2:10 p.m. *90 min* Group discussion to begin with selected Council members sharing their views on the following topics:

- What do you see as the key trends that will define the 2026 economic outlook? How will OBBBA impact the economy, and what new economic measures do you think could be pursued in 2026?
- What magnitude of impact on productivity growth do you expect AI to have over the next one to three years? To what extent will other factors (e.g. tariffs, immigration policy, deregulation) drive productivity changes? What are the implications for monetary policy?

3:40 p.m. *15 min* Break

3:55 p.m. *50 min* Group discussion on the following topic:

- What other risks in the financial system and markets are you focused on that we have not discussed today?

4:45 p.m. *15 min* Closing remarks by Lorie Logan, Seth Searls, and Dawn Fitzpatrick

5:00 p.m. Adjourn