

STEERING COMMITTEE



Natixis Global Asset Management

Jim Cove, Chair
Senior Vice President,
Product Operations & Management



Goldman Sachs

Rachel Schnoll
Managing Director



Macquarie Investment Management

Jim Hinkley
Head of Product Development



OppenheimerFunds

Adam Rochlin
Senior Vice President, Fixed Income and
Co-Head of Investment Products & Solutions



Principal

Jeff Vorwerk, CIMA®
Director, Investment Services



T. Rowe Price

Jim Erceg
Vice President,
Head of Product, North America

COUNCIL

Aberdeen Standard Investments

Alan Goodson
Head of Product, U.S.

American Century Investments

Glen Casey
Senior Vice President &
Global Head of Products

AMG Funds

Keitha Kinne
Chief Operating Officer

AQR Capital Management

Marco Hanig
Principal

Ariel Investments

Merrilyn Kosier
Executive Vice President &
Chief Marketing Officer

Carillon Tower Advisers

Brian Freeman
Director of Affiliate Sales

Charles Schwab & Co.

Jeff Norten
Vice President & Head of
Channel Strategy

Columbia Threadneedle Investments

Dan Beckman
Head of U.S. Product

Diamond Hill Capital Management

Alex Gardner
Head of Product

Dodge & Cox

Rick Marino
Senior Technology Analyst

Federated Investors

Hans Lange
Senior Vice President,
Director of Product Management

Fenimore Asset Management

Debra Pollard
President & Chief Operating Officer

Fidelity Investments

Colby Penzone
Senior Vice President, Investment
Product Management Equity & High
Income

Foresters Investment Management

Thomas Granaghan
Senior Product Manager

Franklin Square

Greg Bassuk
Managing Director

Franklin Templeton Investments

Jeff Kellogg
Senior Vice President, Head of Project
Management and Global Product
Strategy

FundX

Jason Browne
Chief Investment Officer

Harbor Funds

Glenn McBride
Vice President, Executive Office

Heartland Funds

Nicole Best
Senior Vice President, Chief Financial
Officer & Chief Administrative Officer

Hennessy Funds

Teresa Nilsen
Chief Financial Officer &
Chief Operating Officer

Invesco

Tom Tyson
Head of Product Management &
Investment Analysis

Janus Henderson Investors

Drew Elder
Senior Vice President, Head of U.S.
Intermediary Distribution

John Hancock Investments

Leo Zerilli
Senior Vice President, Head of Sales &
Client Relations

Laudus Funds

Jeff Norten
Vice President & Head of Channel
Strategy

Legg Mason

Karen Corso
Director U.S. Mutual Fund Product
Management

Matthews Asia

Frank Wheeler
Global Head of Distribution

MFS Investment Management

David Connelly
Senior Vice President, Global Product

Nationwide

Jennifer Monnin
Vice President, IMG Marketing

Nuveen Investments

Greg Bottjer
Managing Director, Product Strategy

Alan Bryant
Managing Director, Head of Registered
Investment Products

Saturna Capital Corporation

Craig Churman
Vice President Product Development

Segall, Bryant & Hamill

Cindy Knowlton
Director of Marketing, Principal

Thornburg Mutual Funds

John Burnham
Director, Research Communications

Thrivent Mutual Funds

Kristine Mogollon
Director, Investment
Product Management

Wasatch Funds

Eric Bergeson
President

William Blair Funds

Cori Martindale
Head of Product Management

MFEA

Kimber Lintz
Director