HOLISTIC ADAPTATION
OF THE INVESTMENT MANAGEMENT INDUSTRY

SPEAKERS

IMEA LEADERSHIP SUMMIT • NOVEMBER 8 • LEGG MASON • BALTIMORE, MD

Jennifer Ball, Senior Vice President, Global Product Marketing and Insights — Franklin Templeton Investments
Jennifer is responsible on a worldwide basis for product marketing, client marketing and client strategies and analytics.

Brent Beardsley, Senior Partner and Managing Director — The Boston Consulting Group
Brent works with a broad set of wealth management, asset management and hedge fund clients on topics such as growth strategies, organizational design, sales force effectiveness, and target operating models.

Kamal Bhatia, Chief Executive Officer & Co-Head of OC Private Capital — OFI Global and Carlyle Group Joint Venture
Kamal leads a team responsible for product structuring, client engagement, distribution strategy and operating platform.

Jill Brown, President — Principal Funds Distributor
Jill is responsible for the long-term growth of Principal Funds, focusing on sales, assets, advisor growth and business intelligence.

Regina Curry, Chief Diversity Officer — Legg Mason
Regina is responsible for advancing diversity and inclusion initiatives across the firm globally to support their mission of "Investing to Improve Lives" and achieve the growth strategy of "Expanding Client Choice".

Lynn Paschen, Managing Director & Senior Portfolio Manager — Charles Schwab Investment Management
Lynn is responsible for the day-to-day management of the Schwab Government Money Fund, Schwab U.S. Treasury Money Fund, and Schwab Treasury Obligations Money Fund.

Monem A. Salam, Executive Vice President — Saturna Capital Corporation
Monem served as the Director of Islamic investing and Deputy Portfolio Manager to the Amana Mutual Funds Trust until moving to Kuala Lumpur in 2012 to oversee Saturna Sdn. Bhd., Saturna Capital's wholly-owned Malaysian subsidiary, as President.

Howard Schneider, President — Practical Perspectives
Howard works with a wide range of clients to address critical research, strategic, competitive, and tactical challenges. Clients include asset managers, broker-dealers, insurance companies, and service providers with assignments across a wide range of issues involving strategy, distribution, product development, and marketing.

Rachel Schnoll, Managing Director — Goldman Sachs Asset Management
Rachel is responsible for GSAM's investment products and services primarily to financial intermediaries, who provide advice to retail investors. She leads a team responsible for the development and ongoing product strategy of mutual funds, collective trusts and closed-end funds.

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