

## 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 Norton  
Vice President, Channel Marketing

### **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**

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Vice President, Executive Office

**Heartland Funds**

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Senior Vice President, Chief Financial  
Officer & Chief Administrative Officer

**Hennessy Funds**

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Chief Operating Officer

**Invesco**

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Head of Product Management &  
Investment Analysis

**Janus Henderson Investors**

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Intermediary Distribution

**John Hancock Investments**

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Client Relations

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Vice President, Channel Management

**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**

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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  
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**William Blair Funds**

Cori Martindale  
Head of Product Management

**MFEA**

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