



1/24/2023

All-Council Roundtable | 2023 Outlook Participants

6sense Insights, Inc.

Crista Messenger Strategic Marketing and Industry Solutions Specialist

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Ann Gillespie Head of Product Development Americas

James Staines Senior Manager - CRM and Digital Strategy

American Century Investments

Glen Casey Senior Vice President-Global Products & Strategy

Sandra Testani Vice President, ETF Product & Strategy

Artisan Partners

Brett George Director, Global Distribution

Jessica Steinman CRM Business Analyst

John Pahmeier Managing Director

Scott Dorman Associate Director

Boston Consulting Group

Chris McIntyre Partner

Calamos Investments

Jessica Fernandez Chief Marketing Officer

Charles Schwab

Angel Romero Managing Director

Cohen & Steers

Ryan Bolton Vice President, Head of Digital Marketing

Columbia Threadneedle Investments

Rebecca Patchen Senior Marketing Manager

Suzanne Lieb Deputy Head of North America Marketing

Vicki Lester Head of Intermediary Marketing

Diamond Hill Capital Management

Alexander Gardner Managing Director

Ankita Park Digital Marketing Manager

Chris Brunner Director - Marketing

Federated Hermes

Bud Person Executive Vice President & Director Portfolio Construction

Jody Walter Associate Director Strategic Partnerships Responsible Investing Office

Paul Uhlman President, Federated Securities Corp.

Fenimore Asset Management

Anne Putnam Senior Vice President

Frank Privitera Director of Marketing

Fidelity Investments

Eric Kaplan Head of Asset Allocation & Institutional Product

Franklin Templeton Investments

Ivana Wendling Director, investments learning

Roger Michaud SVP - Divisional Sales Manager

FundX Investment Group

Jeff Smith Managing Director

Goldman Sachs

Matt Hostasa Head of Advisor Sales

Troy Thornton Managing Director

Michael Twohig Head of US Public Product Development

Hennessy Funds

Brian Carlson Head of Distribution

Lauri Hammer Marketing

Invesco

Adam Rochlin Head of FI Business Strategy & Development

Alex Cahill Senior Marketing Manager

Izaak Mendelson Head of Model Distribution

Jamie Perello Associate Marketer

John McDonough Head of Wealth Management Intermediaries

Matthew Brady Marketing Director

Melissa Konopka Senior manager, retail marketing

Mike Palazzo Marketing Manager

Rocco Benedetto Head of Field Sales

Tristen Chew Marketing Associate

Janus Henderson Investors

Alanna Nensel Global Head of Brand, Creative & Digital

Jessica Leoncini Global Head of Product Management & Marketing

John Hancock Investments

Brenna McGill Marketing Coordinator

Macquarie

Susan Giffin Manager, Digital Media & Marketing Automation

David Brenner Global Head of Digital, Data and Products

Jim Hinkley Managing Director

Matthews Asia Funds

Jonathan Schuman Global Head of Distribution

MFS Investment Management

Ben Mack Internal Sales Manager

Benjamin Dick Director Strategic Accounts

Bianca Buttgen Marketing Manager

Ellie McGuire Relationship Manager

Jessica Rogerson Assistant Vice President

Jim Adams Managing Director

Jim Gardella Managing Director

Justin Hansen Managing Director

Leslie Checkman Vice President, Director, Client Marketing

Macarena Muñoz Marketing

MFS Investment Management (cont'd)

Maria DiRamio	Assistant Vice President, Senior Marketing Manager Lead
Rebecca Saldarini	Director Marketing
Ruchi Tripathi	Relationship Director
Russ Kilpatrick	Sales Manager
Suzanne Crouch	Global Strategic Accounts

MissionSquare Retirement

Barbara Oppenheim	Vice President of Technology, Engineering and Delivery
Sheri Gilchrist	Chief Marketing Officer
Sonya Sbar	Senior Vice President, Chief Product & Strategy Officer

Natixis Investment Managers

Greg Heath	Vice President, Strategic Marketing
Gregory Fecteau	Vice President
Joseph Klimas	Senior Vice President, Portfolio Analysis & Consulting Group
Kenneth Herold	Product
Nick Elward	Head of Institutional Product and ETFs

Principal Funds

Jeff Vorwerk	Strategic Projects/Portfolio Director
Jessica Henricksen	Director - U.S. Retirement
Jill Brown	Managing Director, US Wealth Platform
John Welp	Head ETF Captial Markets

SalesPage Technologies

Greg Piaseckyj	Head of Sales
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SS&C Technologies

Anne Duduch	Managing Director
Lee Kowarski	Vice President, Head of Distribution Solutions

T. Rowe Price

Annie Brown	Head of USI Broker Dealer
Dan Shively	Product Director
Lauren Smith	Hd of Integrated Marketing
Thomas Kazmierczak	Vice President, Global Product

Thornburg Investment Management

John Hackett	Chief Marketing Officer
Larry Martine	Head of Digital Marketing
Steven King	Head of Content and Channel Marketing

Thrivent Mutual Funds

Gregory Skoge	Manager, Digital Marketing Technology
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Toppan Merrill

Heather Jordan	Chief Product Officer
Jean Goodwin	Vice President Business Solutions

William Blair Funds

Corinne Martindale	Head of Product
Julie Schaeffer	Institutional Marketing