

# DISTRIBUTION INTELLIGENCE SUMMIT

MARCH 4-5 | CHICAGO

ATTENDEES

## Allspring Global Investments



Allegra Heyligers  
Global Distribution Chief Operating Officer

## AMG Funds



Stephen Edwards  
Vice President, Distribution Intelligence

## Amundi US



Dan Clark  
Head of Internal Sales and Sales Enablement



Elaine Villas-Obusan  
Senior Vice President, Head of Retail Marketing, US

## Apollo Global Management, Inc.



Jane Conway | **Presenter**  
Managing Director, Head of Digital Data & Enablement



Alyssa Marinaccio | **Presenter**  
Principal and Head of Digital & Marketing Enablement



Peter Nemia  
Director, Head of Data & Analytics

## Artisan Partners



Scott Dorman  
Associate Director



Sara Sherburne  
Associate | Intermediary Services



Jessica Steinman  
Sales Enablement Manager

## Assetlink



Devon Drew  
Chief Executive Officer

## Bloom AI



Amit Shanker  
Chief Executive Officer, Founder

## BNY Investments



Chris O'Connor | **Presenter**  
Head of Global Data & Distribution Intelligence

## Calamos Investments



Kevin Crouch | **Presenter**  
Vice President, Head of Data Science



Jeff Kelley  
Senior Vice President, Head of Marketing Execution

## Centerbridge Partners



Mark Shpizner  
Head of Sales Strategy and Execution

## Diamond Hill



Chris Brunner  
Director - Digital Platform



Alex Gardner  
Managing Director - Product & Strategy



Elise Giammaria  
Associate Director - Marketing

## Fenimore Asset Management



Jonathan Moran  
Director - Sales

## ForwardLane, Inc.



Eric Johnson  
President



Nathan Stephenson | **Presenter**  
Chief Executive Officer, Founder



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## Franklin Templeton



Andy Dennison | **Presenter**  
Director, Distribution Intelligence

## FS Investments



Esahak Arefaine  
Vice President, Marketing Digital Strategy



Joe Nuyannes  
Sales Strategy

## Goldman Sachs Asset Management



Rama Linga  
Head of Distribution Data, Analytics, and Insights



Matt Machut | **Presenter**  
Managing Director, Global Head of Sales Strategy & Enablement



Mark McShane | **Presenter**  
Head of Sales Strategy & Enablement

## Grafiniti



Paul Ellenbogen  
Head of Research

## Harbor Capital Advisors



Ryan Bathon  
Director of Sales Insights

## Hennessy Funds



Brian Carlson  
Head of Distribution

## Invesco



Vanessa Touma | **Presenter**  
Head of CX Strategy, Distribution Intelligence & Digital Sales



Jane Yue  
Director of Analytics

## Lazard Asset Management



Thej Gurumurthy  
Program Manager



Michelle Liller  
Senior Vice President



Jimmy McDonnell | **Presenter**  
Senior Vice President, Sales Strategy and Business Management

## Macquarie Group



Denise St. Ivany  
Western Division Sales Manager

## MFS Investment Management



Chad Meyer  
Data Strategist



Jim Adams  
Managing Director

## Nasdaq - eVestments



Clay Attebery  
Enterprise Account Director



Brent Clepper  
Senior Director, Enterprise Asset Management

## Natixis Investment Managers



Graham Brewster | **Presenter**  
Senior Vice President, Head of Distribution Operations & Enablement



Kevin Ferry  
Vice President, Distribution Enablement

## Neuberger Berman



John Aguilar  
Head of Intermediary Marketing



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## PIMCO



Hosein Yeh, CFA | **Presenter**  
Senior Vice President, Strategy & Analytics

## Polen Capital

Matthew Dages  
Sales Enablement



Jeff Diamond | **Presenter**  
Head of Advisor Relations

Brian Esler  
Senior Solutions Architect

## Principal Asset Management



Ken Burd | **Presenter**  
Managing Director, Distribution Enablement & Analytics



Rachel Dorris  
Director, Distribution Enablement and Analytics



Josh Wenndt  
Decision Analytics Manager

## Raymond James Investment Management



Al Morabito  
Global Head of Data & Analytics

## RBC Global Asset Management



Jessica Rausch  
Chief Operating Officer

## State Street Global Advisors



Paul Maloney  
Head of Markets Intelligence & Strategic Insights

## T. Rowe Price



Matt Goldwasser | **Presenter**  
Principal, Head of Applied Data Science

## Thornburg Investment Management



Gabriel Parras  
Director, Distribution and Marketing Intelligence



Valerie Schopmann  
Digital Enablement Manager

## Vanguard



David Kim  
Head of Marketing Intelligence & Operations

## William Blair



John Jackson  
Senior Marketing Manager



Sami Lange  
Marketing Specialist



Steve Radis  
Head of Marketing, Investment Management



Lisa Rams  
Conference & Event Manager



Kristina Rediehs  
Business Development Associate



Mary Claire Sabalaskey  
Senior Marketing Specialist



Julie Schaeffer  
Senior Marketing Manager



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## IMEA



Dawn Allen  
Senior Marketing Manager



Kimber Lintz  
Executive Director



Deb Wetherbee  
Senior Business Development Director

CORPORATE PARTNERS

## Broadridge



Ryan Foreman | **Presenter**  
Associate Principal, Data & Analytics



Tim Kresl | **Presenter**  
Managing Principal, Head of US Client Service



Elena Relic-Lytle  
Principal, Data Science



Michael Winnick  
Vice President Business Development,  
Advisor Target | Broadridge Financial Solutions



Ashley Wood | **Presenter**  
Managing Principal, Data & Analytics

## SalesPage



Dave Musselman  
Account Consultant



Mike Nemecek  
Senior Account Manager & Marketing Strategist



John Pumphrey  
Chief of Staff

## SS&C Technologies



Diana Blaney  
Director, WalletShare Product Management



Braden Taubenheim  
Senior Data Analyst



Austin Ulep  
Senior Sales Executive

## Synthesis Technology



Jean Goodwin  
Vice President Global Sales



Greg Healy  
Chief Executive Officer

## Wentworth Financial Communications



Connor Martin  
Chief Operating Officer



Scott Wentworth  
Chief Executive Officer



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