

IM₂A LEADERSHIP SUMMIT

WEDNESDAY, OCTOBER 23 | **NEW YORK**

ATTENDEES

abrdn



Chris Phillips
Product Development Manager

Alpha FMC



Sam Iles | *Discussion Leader*
Executive Director & North America Management Committee Member



Will Karkar | *Discussion Leader*
Executive Director & North America Management Committee Member

American Century Investments



Susie Morris
Vice President, Head of WM Internal Sales

Amundi US



Charles Melanie
Head of Marketing & Product Development



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

Artisan Partners



John Pahmeier
Managing Director

BlackRock



Jay Jacobs | *Discussion Leader*
U.S. Head of Thematic & Active ETFs

BNY Investments



Kara Grehan
*Head of Strategic Accounts,
North America Distribution*



Christine Noland
Head of Advisor Solutions



Lilliam Villafane Di Giacomo
Head of Securities Services Solution Marketing

Brookfield Oaktree Wealth Solutions



Jack O'Toole
Sales Desk Manager

Calamos Investments



Jessica Fernandez
Senior Vice President, Chief Marketing Officer



Anna Narem
Product Management & Analytics

Capital Group



Dan Schreiberstein | *Discussion Leader*
Head of Growth Marketing

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Centerbridge Partners, L.P.



Mark Shpizner
Head of Sales Strategy & Execution

Citi Securities Services



Tod McKenna | *Discussion Leader*
Global Head of Data Science & AI

Columbia Threadneedle Investments



Vicki Lester
Head of Segment Marketing,
Consulting & Development

Diamond Hill Capital Management



Lara Hoffmans
Managing Director - Marketing



Ankita Park
Director - Digital Marketing

Federated Hermes



Diane Marzula
Senior Vice President, Head of Global Accounts



Scott Vallina
Vice President, Director,
Client Engagement Center

Fenimore Asset Management



Jonathan Moran
Director

Franklin Templeton Investments



Ronice Barlow
Senior Vice President,
Senior Strategic Sales Director



Jamie Hedrick
Vice President, Head of Distribution Intelligence



Jeaneen Terrio
Head of Global Communications

FS Investments



Esahak Arefaine
Marketing Director, Digital Strategy



Bernadette Bridy
Managing Director, Head of Marketing

FUSE Research Network



Neil Bathon
Partner



Loren Fox
Director of Research



Jason Heinhorst
Partner

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Goldman Sachs Asset Management



Matt Machut
*Managing Director, Head of Distribution
Strategy & Enablement*



Michael Twohig
Head of U.S. Public Product Development

Invesco



John McDonough | *Discussion Leader*
Head of Americas Distribution



Andrew Phillips
*WMI Head of Internal Sales &
Learning and Development*



Adam Rochlin
Head of Business Strategy & Development



Vanessa Touma | *Discussion Leader*
*Head of CX Strategy, Distribution
Intelligence and Digital Sales*



Rocco Benedetto
*Executive Vice President -
Head of Broker / Dealer Channel*

Janus Henderson Investors



Andrew Evans
Head of Product Marketing



Anne Kvanbeck
Global Head of Corporate Marketing

Macquarie Asset Management



James Hinkley
Managing Director

MFS Investment Management



Jim Adams
Managing Director, Global Strategic Accounts

John Garrett
Managing Director

Nasdaq



Danielle Rutsky | *Discussion Leader*
ETF Lead Product Manager

Nationwide



Keith Bernard
Head of Investment Marketing

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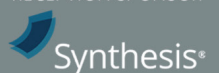
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Natixis Investment Managers



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



James Cove
Executive Vice President



John Festa
Distribution Consultant



Jennifer Round
Senior Vice President, Sales



Susannah Wardly
Senior Vice President, Strategic Marketing

Nuveen



Amy Appicelli
Managing Director, Head of US Wealth Client Marketing



Esti Buskin
Head of Retirement Marketing

Oliver Wyman



Ben Phillips | *Discussion Leader*
Partner

Polen Capital



Alejandro Claudio
Data Operations Manager



Diana Downey
Chief Marketing Officer



Taneka Lawrence
Head of National Accounts

Principal Asset Management



Ed Nini | *Discussion Leader*
Managing Director, Global Head of Product

RBC Global Asset Management



David Eikenberg
Head of US Intermediary



Crystal McClenthen
Head of Institutional Products - U.S. Markets

Saturna Capital Corporation



Max Kaiser
Chief Marketing and Sales Officer



Monem Salam
Executive Vice President / Portfolio Manager



Samar Tariq
Regional Manager

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ATTENDEES

T. Rowe Price



Kathryn Corcoran
Senior Strategic Client Relationship Manager



Sean Mackley
Head of Broker / Dealer National Accounts & Centers of Influence



Matthew Pisanelli
Head of Integrated Sales



Dan Shively
Product Director

Thornburg Investment Management



Michael Corrao
Director of Global Communications



Steven King
Director of Content and Channel Marketing

Thrivent Asset Management



Joanna Miller
Marketing Director

U.S. Global Investors



Joseph Guyer
Senior Financial Writer & Editor

Wasatch Global Investors



Dustin McCarty
Head of Global Distribution

William Blair Funds



Sami Lange
Marketing Specialist



Mary Claire Sabalasky
Senior Marketing Specialist

IMEA



Dawn Allen
Member Manager



Kelcee Allen
Marketing Manager



Kimber Lintz
Executive Director



Dave Master



Deb Wetherbee
Senior Business Development Director

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