

IMOA

NOVEMBER
1-2, 2023

BOSTON

Leadership Summit

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ATTENDEES

Apollo Global Management



Jacob Walker | **Presenter**
*Managing Director and Chief Operating Officer,
Client and Product Solutions*

Artisan Partners



John Pahmeier
Managing Director

BCG



Philip Bianchi | **Presenter**
Partner



Barric Reed | **Presenter**
Partner

Broadridge



Bill Finnegan
Principal, Distribution Insight



Ryan Foreman | **Presenter**
*Associate Principal, Advisory,
Global Strategy Consulting*

Cohen & Steers



Kimberly LaPointe
*Executive Vice President,
Head of Wealth Management*

Columbia Threadneedle Investments



Dan Beckman
Head of North America Product



Vicki Lester
*Vice President, Head of Segment Marketing,
Consulting and Development*



Melissa Werner | **Presenter**
Senior Director, Talent Acquisition

Diamond Hill



Alex Gardner
Managing Director

Federated Hermes



Paul Uhlman
President, Federated Securities Corp.

Fidelity Investments



Eric Kaplan
*Senior Vice President, Head of Asset
Allocation and Institutional Product*



Mark Robillard | **Presenter**
*Vice President, Alternative Investments
Research Analyst*

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Franklin Templeton



Felix Touchard, IV
Vice President, US Alternatives Marketing

FS Investments



Bernadette Bridy
Head of Marketing

FUSE Research Network



Neil Bathon
Founder



Jason Heinhorst
Partner

Goldman Sachs



Matthew Machut
Global Head of Distribution Strategy and Enablement



Rob Montella
Vice President, Senior Strategist



Michael Twohig
Head of U.S. Public Product Development

Hennessy Funds



Brian Carlson
Head of Distribution

IMEA



Dawn Allen
Event Manager



Kimber Lintz | **Presenter**
Executive Director



Dave Master | **Presenter**
Executive Committee

Invesco



Rocco Benedetto
Head of US WMI Field Distribution



Clint Harris
Head of Wealth Management Platforms and Institutional Consultant Relations



John McDonough | **Presenter**
Head of Americas Distribution



Adam Rochlin
Head of Business Strategy and Development, Fixed Income

Janus Henderson Investors



Anne Kvanbeck
Global Head of Corporate Marketing



Jessica Leoncini
Global Head of Product Management and Marketing

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Kathy Freeman Company



Kathy Freeman | **Presenter**
Founder and President

Manulife Investment Management



Katie McKay
Head of Global Retail Sales Enablement

MFS Investment Management | HOST



Jim Adams | **Presenter**
Managing Director, Global Strategic Accounts



Leslie Checkman
Director of Client Marketing



Jenine Garrellick
Senior Managing Director, Retail Internal



Michael Keenan
President of MFS Distributors, Inc.



Sean Kenney
Co-Head of Retail Distribution



Michael Kuell
Senior Video Producer



Katherine Mudarri
Managing Director of Global Platforms

MissionSquare Retirement



Matthew Brenner
*Managing Vice President,
Investment Product Management*

Nationwide Financial



Keith Bernard
*Head of Investment Management
Group Marketing*

Natixis Investment Managers



Jim Cove | **Presenter**
*Executive Vice President and
Head of U.S. Marketing*



Kenneth Herold
Head of Product



Susannah Wardly
Senior Vice President, Marketing

Principal



Jill Brown
President, Principal Funds Distributor



Mona Dessouki
Executive Director, Chief Marketing Officer



Edward Nini
Managing Director, Global Head of Product

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RBC Global Asset Management



Donald Sanya
Head of US Distribution

Ridgway Partners



Hari Krishnaswami | **Presenter**
Managing Director



Kevin McKeon
Partner

Saturna Capital



Monem Salam
Executive Vice President

SS&C



Matt Fronczke | **Presenter**
Senior Director



Lee Kowarski | **Presenter**
Head of Distribution Solutions



Austin Ulep
Research, Analytics and Consulting

T. Rowe Price



Annie Brown
Head of Broker / Dealer Distribution



Mary Louise Fletcher
Divisional Sales Manager



Sean Mackley
*Head of Business and Development
National Accounts*

The Carlyle Group



Shane Clifford | **Presenter**
*Managing Director - Partner,
Head of Private Wealth Strategy*

William Blair



Theresa Shweers
Lead Marketing Specialist