

# National Accounts Council ROUNDTABLE

TUESDAY, OCTOBER 22 | **NEW YORK**

ATTENDEES

## American Century Investments



Stacy Bernstein | *Discussion Leader*  
Vice President, Head of National Accounts  
Financial Intermediaries

## Artisan Partners



John Pahmeier  
Managing Director

## BNY Investments



Kara Grehan  
Head of Strategic Accounts,  
North America Distribution

## Broad Ridge



Tim Kresl | *Discussion Leader*  
Principal of Distribution Insight

## Federated Hermes



Diane Marzula | *Discussion Leader*  
Senior Vice President,  
Head of Global Accounts

## Fenimore Asset Management



Jonathan Moran  
Director

## Fidelity Investments



Thomas Abare  
Senior Vice President -  
Investments & Financial Planning

## Franklin Templeton Investments

Derik Liberatore  
Senior Vice President,  
Head of Private Banks

## Invesco



Sean Carey | *Discussion Leader*  
Senior Strategic Account Manager,  
Wealth Management Platforms

## Janus Henderson Investors



Bill McNamara  
Head of Client Coverage Group

## John Hancock Investment Management



Zach Flechtner | *Discussion Leader*  
Head of National Accounts

## MFS Investment Management



Jim Adams  
Managing Director, Global Strategic Accounts

John Garrett  
Managing Director

## Polen Capital



Taneka Lawrence | *Discussion Leader*  
Head of National Accounts

## RBC Global Asset Management



David Eikenberg  
Head of US Intermediary

## T. Rowe Price



Annie Brown  
Co-Head of USI Wealth Management



Sean Mackley | *Discussion Leader*  
Head of Broker / Dealer National Accounts  
& Centers of Influence

## IMEA



Deb Wetherbee  
Senior Business Development Director

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