

OCTOBER 28-29 | NEW YORK

LEADERSHIP SUMMIT

ATTENDEES

AllianceBernstein



Susanne Russotto
*Senior Vice President, Chief Operating Officer
of US Retail Distribution*

American Century Investments



Jennifer Debrosky
Senior Director, Product Management



Natalie Reed
Product Marketing Strategist

Apollo Global Management



Delcy Dsilva
Director, Client & Product Solutions

Artisan Partners



John Pahmeier
Managing Director, Intermediary Services

BNY



Lilliam Villafane Di Giacomo
Head of Securitie Services Solution Marketing



Kara Grehan
Head of Global Financial Institutions

Calamos



Gianni Conti
Vice President, Director of Product Management



Anna Narem
Product Management & Analytics

Columbia Threadneedle Investments



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

Diamond Hill



Alex Gardner
Managing Director - Product & Strategy



Elise Giammaria
Associate Director - Marketing



Colin Prescott
*Managing Director - Intermediary
Business Development*



Craig Tann
Managing Director, Strategic Partners

Dodge & Cox



Ryan Utsumi
*Vice President, Head of Fixed Income Client
Service & Client Portfolio Manager*

OCTOBER 28-29 | NEW YORK

LEADERSHIP SUMMIT

ATTENDEES

Franklin Templeton



Ann Doyle
Head of US Product



Jamie Hedrick
Head of Global Distribution Intelligence



Bill Jacobs
Senior Vice President, Head of Internal Sales for US Wealth Management



Derik Liberatore
Head of Private Banks

FUSE Research Network



Neil Bathon
Founder & Partner



Mario Favetta
Relationship Manager

Goldman Sachs Asset Management



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



Michael Twohig
Head of US Public Product Development

Invesco



Rocco Benedetto
Head of Field Sales, US Wealth Management Intermediaries



David Borrelli
Senior Vice President, National Sales Director



John McDonough
Head of Americas Distribution



Adam Rochlin
Head of Business Strategy & Development, Investments



Adam Rochlin
Head of Business Strategy & Development, Investments



Vanessa Touma
Head of CX Strategy, Distribution Intelligence and Digital Sales

Janus Henderson Investors



Andrew Evans
Head of Product Marketing

Lincoln Financial Distributors, Inc.



Tracy Newgent
Internal Sales Manager

McChrystal Group



Ryan Flynn | **Presenter**
Partner



Jonah Mishkel
Senior Associate

OCTOBER 28-29 | NEW YORK

LEADERSHIP SUMMIT

ATTENDEES

MFS Investment Management



Jim Adams
Managing Director, Global Strategic Accounts



Leslie Checkman
Vice President, Senior Director of Global Marketing



Chris Hedges
Managing Director

Nationwide



Paul Eisenhardt
Head of Institutional

Natixis Investment Managers



Graham Brewster
Head of Distribution Operations & Enablement



Jim Cove
Executive Vice President, Head of U.S. Marketing



Kenneth Herold
Executive Vice President, Head of Product



Jennifer Round
Senior Vice President, Sales



Jay Wightman
Senior Vice President, Head of Digital Marketing

Nuveen



Esti Buskin
Head of Retirement Marketing



Tara Giuliano
Chief Marketing Officer

Oliver Wyman



Ben Phillips | **Presenter**
Partner

Polen Capital



Laura Graff
Head of Product Strategy and Marketing

Principal Asset Management



Ken Burd
Director, Distribution BI & Analytics



Ed Nini
Managing Director - Global Head of Product



Amy Rexford
Director - Product Development & Intelligence

RBC Global Asset Management (U.S.) Inc.



Julia Burr
Head of National Accounts



David Eikenberg
Head of US Intermediary



Crystal McClenthen
Managing Director, Institutional Product Management



EVENT
HOST



Invesco

LEADERSHIP
PARTNER



OCTOBER 28-29 | NEW YORK

LEADERSHIP SUMMIT

ATTENDEES

Saturna Capital



Monem Salam
Executive Vice President

Suzanne Norman Coaching and Consulting LLC



Suzanne Norman
Principal

T. Rowe Price



Michael Benedetto
Head of Global SMA Platform and Model Portfolios



Annie Brown
Co-Head of USI Wealth Management



Kathryn Corcoran
*Vice President, Broker Dealer /
Global Bank National Accounts*



Matt Pisanelli
Head of USI Integrated Sales

Thornburg Investment Management



Michael Corrao
Director of Global Communications

Vanguard



Erick Conklin
Head of Advisor Sales, Wirehouses

IMEA



Dawn Allen
Manager, Members Services & Events



Kelcee Allen
Marketing Manager



Kimber Lintz
Executive Director



Deb Wetherbee
Senior Business Development Director

OCTOBER 28-29 | NEW YORK

LEADERSHIP SUMMIT

PARTNERS & SPONSORS

Alpha FMC



Benjie Elston | **Presenter**
Partner, Asset & Wealth Management

Broadridge



Ryan Foreman | **Presenter**
Associate Principal, US Distribution Solutions

Corporate Insight



Samantha Fritsch
Research Manager

Seismic



Bob Murphy | **Presenter**
Vice President - Financial Services & Solutions

SS&C Technologies



Jeff Strange | **Presenter**
Strategic Business Consultant for WalletShare