

# MODELS ROUNDTABLE

SEPTEMBER 25 | BALTIMORE



ATTENDEES

## BlackRock



Philip Colussi  
*Portfolio Consultant*



Baker Vitale  
*Head of Consulting - Portfolio Design Team*

## BNY



Matthew Hutchinson  
*Investment Strategist*

## Capital Group



Steven Fox  
*Director, Client Portfolio Solutions*

## Cerulli Associates



Jared Baucom  
*Managing Director, Global Sales & Marketing*



Maeve Flanagan  
*Associate Director, Account Management*



Brendan Powers  
*Director, Product Development*

## CI Global Asset Management



Blake Verdonk  
*Portfolio Consultant*

## Diamond Hill



Nathan Miller  
*Director - Product and Strategy*

## Federated Hermes



Bud Person  
*Executive Vice President & Director,  
Portfolio Construction Services*



Anthony Zugec  
*Manager, Research Consultant*

## Fenimore Asset Management



Jonathon Moran  
*Director - Sales*

## Franklin Templeton



Devin Murphy  
*Portfolio Consultant*



Adam Smith  
*Vice President, Senior Portfolio Consultant*

## Habor Capital



Bryan Schenk  
*Investment Strategist*

## Invesco



Tom Landhauser  
*Model Portfolio Specialist*

## Janus Henderson Investors



Adam Hetts  
*Global Head of Multi-Asset, Portfolio Manager*

# MODELS ROUNDTABLE

SEPTEMBER 25 | BALTIMORE



ATTENDEES

## Manulife John Hancock Investments



John Bryson  
Head of Investment Consulting, Investment Data  
Analytics & Education Savings

## MFS Investment Management



Jim Adams  
Managing Director



Katherine Mudarri  
Managing Director

## Natixis Investment Managers



Mark Cintolo  
Senior Vice President

## Nuveen



Jeff Stanley  
Portfolio Strategist

## Picton Mahoney



Pawan Vatvani  
Head of Portfolio Construction

## Principal Asset Management



Alexander Ohlemacher  
Portfolio Consultant

## State Street Global Advisors



Bree Roberts  
Model Portfolio Strategist

## Sun Life Global Investments



Badan Fong  
Portfolio Strategist

## T. Rowe Price



Chris Augelli  
Head of Advisor Engagement, U.S. Intermediaries



Thomas Casperite  
Head of Portfolio Construction Solutions Specialist



Josh Horesh  
Head of U.S. Model Portfolio Distribution

## Vanguard



Victor Zhu  
Senior Manager, Multi-Asset Investment Strategist

## WisdomTree



Brendan Loftus  
Director, Portfolio Solutions



Lauren Pfendt  
Associate, Portfolio Solutions

## IMEA



Kimber Lintz  
Executive Director



Deb Wetherbee  
Senior Business Development Director