NATIONAL ACCOUNTS SUMMIT

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ATTENDEES

American Century Investments



Stacy Bernstein
Head of Financial Intermediaries

Artisan Partners



John Pahmeier
Managing Director, Intermediary Client Services

BNY Investments



Kara Grehan
Head of Strategic Accounts

Broadridge



Tim Kresl | ***Presenter***
Managing Principal, Head of US Client Service

Clark Capital Management Group



Jeff Coron
Head of National Accounts

Diamond Hill



Craig Tann
Managing Director, National Accounts and Client Engagement

Federated Hermes



Diane Marzula
Manager of Global Accounts

Fidelity Investments



Bob Bachman
Head of Financial Institutions

FS Investments



Laurie Durante
Managing Director, Head of Platform Strategy & Senior Relationship Management

Heartland Funds



Michael Kops
Vice President, Distribution

Janus Henderson Investors



Bill McNamara
Managing Director, Head of Client Coverage

Manulife John Hancock Investments



Zach Flechtner
Head of National Accounts

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ATTENDEES

Nationwide



Tom Tyson
Managing Director - National Platforms

Polen Capital



Taneka Lawrence
Head of National Accounts

RBC Global Asset Management



Julia Burr
Head of National Accounts

Saturna Capital



Marybeth Swisher
National Accounts Manager

T. Rowe Price



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

TIFIN AMP



Jeff Mehi | ***Presenter***
Head of Wealth Partnerships

IMEA



Kimber Lintz
Executive Director



Deb Wetherbee
Business Development Director