

SEPTEMBER 24 | BALTIMORE

# PORTFOLIO CONSTRUCTION ROUNDTABLE

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*

## CI Global Asset Management



Blake Verdonk  
*Portfolio Consultant*

## Diamond Hill



Nathan Miller  
*Director - Product and Strategy*

## Federated Hermes



Jared Orr  
*Portfolio Strategist*



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



Emory Redd  
*Vice President, Portfolio Strategist*

## Fenimore Asset Management



Jonathon Moran  
*Director - Sales*

## Fidelity Investments



Paul Ma  
*Vice President, Lead Portfolio Strategist*

## Franklin Templeton



Devin Murphy  
*Portfolio Consultant*



Adam Smith  
*Vice President, Senior Portfolio Consultant*

## FUSE Research Network



Mike Evans  
*Partner & Director of Advisor  
& BenchMark Research*

## Goldman Sachs Asset Management



T.P. Enders  
*Managing Director, Head of Public Capital Markets*

## Harbor Capital



Bryan Schenk  
*Investment Strategist*

## Invesco



Rick Casagrande  
*Head of Portfolio Advisory*

## Jacobi Strategies



Elena Anisimova  
*Vice President of Sales, North America*



Liz Gartsman  
*Sales Director, North America*



Tony Mackenzie  
*Co-Founder & Chief Executive Officer*

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## Janus Henderson Investors



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

## Manulife John Hancock Investments



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



Gabriele Vincenzo  
*Investment Consultant*

## MFS Investment Management



Jim Adams  
*Managing Director*

## Natixis Investment Managers



Mark Cintolo  
*Senior Vice President*

## Ninepoint Partners LP



Karim Abdallah  
*Assistant Vice President*

## Nuveen



Jeff Stanley  
*Portfolio Strategist*

## Picton Mahoney



Christine Li  
*Portfolio Construction Associate*



Pawan Vatvani  
*Head of Portfolio Construction*



Hank Xiong  
*Senior Associate, Portfolio Construction*

## 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*