

# INSTITUTIONAL ROUNDTABLE

NOVEMBER 18 | NEW YORK

ATTENDEES

## Amova Asset Management



Johanna Woldai  
*Vice President, Institutional Sales & Marketing*

## Fenimore Asset Management



Jonathan Moran  
*Director - Sales*

## Fidelity Investments



Geoffrey Allen  
*Vice President, Institutional Market Enablement*

## Goldman Sachs Asset Management



Lauren Ferry  
*Head of Product Strategy, Americas*

## GQG Partners



Geoffrey Doyle  
*Senior Director, Business Development*

## Invesco



Ben Stewart | **Presenter**  
*Head of Business Strategy & Development, Equities*

## Mercer



David Hyman | **Presenter**  
*Partner & Head of Client Service,  
Financial Intermediary Practice*

## Nasdaq eVestment



Dan Caron | **Presenter**  
*Vice President, Head of Enterprise Client Group*



Russ Elliott | **Presenter**  
*Head of Asset Management Market Intelligence*

## Northern Trust Asset Management



Mark Shpizner  
*Global Head of Institutional Sales Enablement*

## Nuveen



Kurt Stam  
*Managing Director, Head of Public Product  
Strategy and Development, Institutional*

## RBC Global Asset Management



Crystal McClethen  
*Head of Institutional Products*

## Synfinii



John Pumphrey  
*Chief of Staff*

## The TCW Group



Gina McCarthy  
*Managing Director, Chief Operating Officer  
for Global Distribution*



Rafael Oliveira  
*Head of Distribution Technology*

## Thrivent Asset Management



James Farrow  
*Institutional Business Development and  
Relationship Manager Lead*

## IMEA



Kimber Lintz  
*Executive Director*



Deb Wetherbee  
*Senior Business Development Director*