

# INTERNAL SALES DESK SUMMIT

JUNE 4 | ATLANTA

ATTENDEES

## American Century Investments



Farrel Huttner  
Regional Wealth Management Team Lead (West)



Alex Beck  
Internal Sales Desk Team Lead

## Deloitte Consultants



Nitin Dua | **Presenter**  
Principal

## Dodge & Cox



Matthew Hauselt  
Vice President

## Federated Hermes



Jillian Cochran  
Internal Sales Manager

## Franklin Templeton



Bill Jacobs | **Presenter**  
Senior Vice President, Head of Internal Sales for U.S. Wealth Management

## Future Standard



Meredith Hesdon  
Managing Director, Head of Internal Sales

## GW&K Investment Management



Mike Kaplan  
Sales Desk Manager

## Invesco



Andrew Phillips | **Presenter**  
Head of Internal Sales & WMI Learning & Development

## Janus Henderson Investors



Beau Bokelman | **Presenter**  
Managing Director, Head of Internal Sales

## Lazard Asset Management



Roshun Pai  
Senior Vice President - National Sales Desk Manager



Kelly Ryan  
Managing Director, Co-Head Financial Institutions Group

## Lincoln Financial Investments



Tracy Newgent  
Internal Sales Manager

## MFS Investment Management



Dan Driscoll  
Retail Manager



Conor Lucey  
Internal Sales Manager

## Morgan Stanley



Andy Harbour, CFP, CIMA, CRPS | **Presenter**  
Managing Director, Financial Advisor



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## **Nationwide Financial**



Jeff Swearingen  
*Assistant Vice President, Internal Sales*

## **Natixis Investment Managers**



Jennifer Round | **Presenter**  
*Senior Vice President, Sales*

## **Nomura Asset Management**



Alex Freud  
*Team Lead - Internal Sales*

## **Nuveen**



Luis Pelaez  
*Managing Director, Head of Internal Sales*

## **Platinum Wealth Management of Buckhead**



Dan Kundla, CFP | **Presenter**  
*Senior Vice President of Investments*

## **Polen Capital**



Dan McLennon  
*Head of Internal Sales - US Wealth Management*

## **IMEA**



Kimber Lintz  
*Executive Director*



Deb Wetherbee  
*Senior Business Development Director*



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