

NATIONAL ACCOUNTS SUMMIT

SEPTEMBER 23 | BOSTON

ATTENDEES

AllianceBernstein



Michael Capella
Head of Strategic Relationship Group

American Century Investments



Stacy Bernstein | **Discussion Leader**
Head of Financial Intermediaries

Artisan Partners



John Pahmeier
Managing Director, Intermediary Services

Broadridge



Tim Kresl | **Discussion Leader**
Managing Principal, Head of US Client Success

Federated Hermes



Diane Marzula | **Discussion Leader**
Senior Vice President, Head of Global Accounts

Fenimore Asset Management



William Wise
Director

Fidelity Investments



Derek Wallen
Head of Intermediary Relationship Management

Franklin Templeton



Derik Liberatore
Head of Private Banks

Harbor Capital Advisors, Inc.



Mary Gordon
Senior Vice President - Head of National Accounts

J.P. Morgan Asset Management



Gaurav Mittal
Managing Director, Head of
Relationship Management Team

LPL Financial



Alicia Boylan | **Discussion Leader**
CIMA | Vice President, Strategic Partners

Manulife John Hancock Investments



Zach Flechtner | **Discussion Leader**
Head of National Accounts

MFS Investment Management



Jason Peters
Relationship Director

Nationwide



Tom Tyson
Managing Director - National Platforms

Principal Asset Management



Andrew Miller
Managing Director - Strategic Client Group - U.S. Wealth

RBC Global Asset Management



Julia Burr
Head of National Accounts

T. Rowe Price



Sean Mackley | **Discussion Leader**
Head of Wealth Strategic Accounts

Virtus Investment Partners



Chris Danos
Head of National Accounts

WisdomTree

Joseph Windish
Head of National Accounts

IMEA



Deb Wetherbee
Senior Business Development Director



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