MODELS ROUNDTABLE

OCTOBER 15 | BALTIMORE

ATTENDEES

BlackRock



Baker Vitale
Head of Portfolio Design Services



Susan Wasserman
Head of Americas Portfolio Consulting, Investment & Portfolio Solutions

BMO Global Asset Management



Darim Abdullah
Director, ETFs & Portfolio Consulting

Capital Group



Grace Pelczynski
Product Manager



Mark Barile
Senior Manager, Portfolio Consulting & Analytics

Cerulli Associates



Bing Waldert
Managing Director of Research



Jared Baucom
Managing Director, Distribution & Operations

Federated Hermes



Emory Redd
Director of Portfolio Construction

Franklin Templeton



Adam Smith
Vice President, Senior Portfolio Consultant

FUSE Research Network



Mike Evans
Partner & Director of Advisor & BenchMark Research

Harbor Capital



Jason Alonzo
Head of Portfolio Solutions



Bryan Schenk
Director, Portfolio Solutions



Alberto Pea
Senior Research and Risk Analyst

Invesco



Tom Landhauser, CFA
Model Portfolio Specialist

Janus Henderson



Joshua Fisher
SMA Product Development



Terry Ober
Managing Director, SMA Models Specialist Group

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ATTENDEES

Manulife John Hancock Investments



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

MFS Investment Management



Bryan Potts
Senior Strategist

Picton Investments



Layn Holtby
Associate, Portfolio Construction



Hank Xiong
Manager, Portfolio Construction



Stefano Cavaliere
Portfolio Strategist

Schwab Asset Management



Inga Rachwald
Senior Investment Portfolio Strategist

SEI



Bryan Hoffman
Global Head of Advice and Asset Allocation

T Rowe Price



Som Priestley
Head of Global Investment Solutions, Americas & Portfolio Manager

T Rowe Price



Joshua Horesh
Head of U.S. Model Porfolio Distribution



Jason Horenci
Senior Manager, Advisor Engagement



Chris Augelli
Head of Advisor Engagement, U.S. Intermediaries



Thomas Casperite
Head of Portfolio Construction Specialists



Matt Pisanelli
Head of Integrated Sales



Dan Grossmann
Senior Product Manager

WisdomTree



Brendan Loftus
Director, Portfolio Solutions



Lauren Pfendt
Senior Associate, Portfolio Solutions

IMEA



Kimber Lintz
Executive Director



Dawn Allen
Manager of Member Services & Events

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