# PORTFOLIO CONSTRUCTION ROUNDTABLE

**OCTOBER 14** | BALTIMORE

## ATTENDEES

### BlackRock



Baker Vitale
*Head of Portfolio Design Services*

### BMO Global Asset Management



Darim Abdullah
*Director, ETFs & Portfolio Consulting*

### BNY Investments



Cali Mazzara
*Investment Strategist*

### Capital Group



Mark Barile
*Senior Manager, Portfolio Consulting & Analytics*



Grace Pelczynski
*Product Manager*

### CI Global Asset Management



Nirujan Kanagasingam
*Senior Vice President, Head of Investment Advisory & ETF Strategy*



Blake Verdonk
*Director, Investment Portfolio Advisory*

### 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



Bryan Schenk
*Director, Portfolio Solutions*



Alberto Pea
*Senior Research & Risk Analyst*

### Invesco



Rick Casagrande
*Head of Portfolio Advisory*

### Jacobi Strategies



Tony Mackenzie
*Co-Founder*

### Janus Henderson



Joshua Fisher
*SMA Product Development*

### Manulife John Hancock Investments



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

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### 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 & Asset Allocation*

### T Rowe Price



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



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



Thomas Casperite, CFA
*Head of Portfolio Construction Specialists*



Jason Horenci
*Senior Manager, Advisor Engagement*



Matt Pisanelli
*Head of Integrated Sales*

### WisdomTree



Lauren Pfendt
*Senior Associate, Portfolio Solutions*



Brendan Loftus
*Director, Portfolio Solutions*

### IMEA



Kimber Lintz
*Executive Director*



Dawn Allen
*Manager of Member Services & Events*

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