LEADERSHIP SUMMIT 2026

NOVEMBER 11-12 | *NEW YORK*

ATTENDEES

AllianceBernstein



Noel Archard
Global Head of Product Solutions & Marketing

Allspring Global Investments



Allegra Heyligers
Global Distribution Chief Operating Officer

American Century Investments



Amanda Jacobi
Head of Financial Intermediaries

Ave Maria Funds



Bob Geppner
Director of Strategic Planning

Blackstone



Sheila Rapple
Private Wealth COO of the Americas, Senior Managing Director

Broadridge



Tim Kresl
Managing Principal, Head of Client Success

Calamos Investments LLC



Kevin Crouch
Senior Vice President, Head of Data Science

Columbia Threadneedle



Vicki Lester
Head of Segment Marketing & Consulting & Development

Deloitte Consulting



Nitin Dua | **Presenter**
Principal & Partner



Kira Mikulecky
Principal



Parker Schultz
Senior Manager



Sofia Di Lodovico
Experience Designer | Strategy | Research | Consultant



Lindsey Meyers
Research and Design Senior Consultant

Direxion



Jessica Fernandez
Global Chief Marketing Officer

Fenimore Asset Management



Anne Putnam
Chief Executive Officer

First Eagle Investments



Alex Gardner
Managing Director

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Franklin Templeton


Kimberly Roy
Chief Operating Officer


Ann Doyle
Chief Operating Officer, U.S. Distribution

Kevin Gallagher
GCG Strategy & Analytics

FUSE Research Network


Neil Bathon
Managing Partner


Jason Heinhorst
Partner


Mario Favetta
Relationship Manager


Loren Fox
Director of Research

Goldman Sachs Asset Management


Matt Machut
Managing Director, Global Head of Sales Strategy & Enablement


Michael Twohig
Head of U.S. Public Product Development

GW&K Investment Management


Brian King
Head of U.S. Wealth

Harbor Capital Advisors


Chase Bower
Senior Vice President, Head of Sales

Impax Asset Management


Leah Wood
Executive Director, Marketing & Communications

Invesco


Rocco Benedetto
Executive Vice President, Head of US Retail Distribution


Karl Desmond
Head of Model Portfolio Management


Andrew Phillips
Head of Internal Sales


David Borelli
Head of Field Distribution


Vanessa Touma
Chief Operating Officer, Americas Distribution


Matthew Brady
Head of U.S. Intermediary Marketing


Ben Stewart
Head of Business Strategy & Development, Equities and Listed Real Assets

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ATTENDEES

Janus Henderson



Andrew Evans
Head of Product Marketing

Lazard Asset Management



Kelly Ryan
Managing Director

Lincoln Financial Distributors, Inc.

Tracy Newgent
Internal Sales Manager



Tom Morelli
Senior Vice President, Head of Investment Distribution

MFS



Jim Adams
Managing Director

Natixis Investment Managers



Graham Brewster
Head of Distribution Operations & Enablement



James Cove
Executive Vice President, Head of US Marketing

Nomura



Steven Schlow CFA
Head of Private Markets Distribution



David Chorba
National Sales Manager

Northern Trust



Jean Kaihatsu
Head of Distribution Intelligence

James Buscemi
Analyst, Data Analytics & Business Intelligence

Nuveen



Eric Cibula
Head of Business Management & Strategy - Global Wealth

Oliver Wyman



Ben Phillips | **Presenter**
Partner



Joonsuk Lee | **Presenter**
Principal

Principal Asset Management



Ed Nini
Managing Director, Head of Product



Owais Rana
Managing Director– Head of Investment Solutions

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ATTENDEES

RBC Global Asset Management



Julia Burr
Head of National Accounts

Ronald McDonald House



Sotirika Janaqi
Volunteer Recruitment Coordinator

SS&C Technologies



Lee Kowarski
Head of Distribution Solutions

T.Rowe Price



Eric Wagner
General Manager - US Intermediaries



Matt Pisanelli
Head of Integrated Sales



Sean Mackley
Head of Broker/Dealer National Accounts



Jim Zurad
Co-Head of USI Wealth Management, Field Sales

Thornburg Investment Management



Michael Corrao
Director of Global Communications

UBS Asset Management



Elaine Villas-Obusan
Head of Client Marketing, Americas

Vanguard



Ryan MacArthur
Principal, Head of Distribution Strategy & Enablement



Izaak Mendelson
Head of Model Portfolios

IMEA



Kimber Lintz
Executive Director



Dawn Allen
Manager of Member Services & Events



Deb Wetherbee
Business Development Director

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