



Fall 2022 Participants Atlanta, GA

First Name	Last Name	Role/Title	Firm
Stephen	Alepa	CEO	Olmstead
Daniel	Alexander	Head of Analytics	SS&C
Katie	Artz	Director of Marketing	MarketBridge
Lindy	Belley	Marketing Director	HSO
Tom	Berger	VP, Financial Services	HSO
Ben	Bird	Business Development	XALT / PureGroup
Jason	Brown	Principal	ZS Associates
Brennan	Burkhart	Founder	Kyloe
Wil	Chacon-Miller	Data Analyst/Client Distribution & Analytics	Nuveen
Chris	Chang	Distribution Enablement	Allspring Investments
Inderjit	Chhatwal	Facilitator	SME Forum
Dan	Clark	SVP, Head of Inside Sales & Analytics	Amundi
David	Cocks	Director Data Strategy	Amundi
Danielle	Coletto	User Engagement Specialist	Invesco
Aaron	Courter	Product Manager	SS&C
Abhijeet	Dalvi	SVP, Enterprise Application Technology	Natixis
Devin	Davis	Head of Digital & Demand Generation	Macquarie
Julian	Edelman	Senior Associate	SME Forum
Stephen	Edwards	VP, Distribution Intelligence	AMG Funds
Matt	Feeney	Associate Principal	Broadridge
Michelle	Feinstein	VP & GM, Wealth & Asset Management	Salesforce
Kevin	Ferry	VP, Head of Data Ops & Governance	Natixis
William	Finnegan	Principal	Broadridge
Amy	French	Senior Business Systems Analyst	Diamond Hill
Mario	Gallotto	Sole Proprietor	MGallotto Consulting
Hazem	Gamal	COO	SME Forum
Liz	Gamal	The Boss	SME Forum
Nicholas	Garza	Product Owner / Senior Analyst Developer	Calamos Investments
Mike	Gerson	Senior Director, Client Experience	eVestment
Brendan	Griffin	CRM Program Manager	T. Rowe Price
John	Halaby	EVP, Head of Distribution	Harbor Capital
Lindsey	Hanson	Head of Client Service Technologies	Income Research & Man.
Hugh	Head	Data Analytics Engagement Lead	eVestment
Marianne	Hewitt	Growth Strategist	Growth Strategy Group
Barney	Holmes	Partner	Meritus
Bill	Hortz	Founder & Dean	Institute Innovation Development



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Chris	Howard	Relationship Manager	eVestment
Chris	Jackson	VP, Advanced Analytics & BI	Federated Hermes
Vinay	Jain	Head of Client Data Strategy	Neuberger Berman
Shonda	Jaquez	Director of Belonging	SalesPage
Jacqueline	Jeffrey	Scribe/Notetaker	SME Forum
Brendan	Joyce	GWM Strategy Analyst	PIMCO
Scott	Kasper	Manager Client Engagement	Olmstead
James	Keenan	VP Marketing, Digital Strategy	AMG Funds
Laura	Kilday	Director Global Lead Management	T. Rowe Price
Daniel	Knoth	Director Sales Analytics	New York Life
Nick	Kremer	Lead Business Technologist - Salesforce	Neuberger Berman
Tim	Kresl	Principal	Broadridge
Dave	Kriz	Head of Strategy	Hey DAN
Ryan	Kubie	Team Lead, Client Information Services	Lord Abbett
Amanda	Lambert	Internal Sales Director	Invesco
Craig	Lieb	CRM, Sales & Marketing Enablement	Invesco
David	Martin	Managing Director, Distribution Intelligence	Virtus Investments
Diane	Marzula	SVP Director, Client Engagement Center	Federated Hermes
Hugh	Massie	Founder & CEO	DNA Behavior
Kenny	McColl	Founder	Kyloe
Michael	Mendelowitz	Director - US Sales Insights	Franklin Templeton
Nathan	Miller	Data Strategist	Diamond Hill
Leon	Morales	President, Managing Director	DNA Behavior
Leah	Mullen	Director, Distribution Strategy & Analytics	Putnam Investments
Arun	Muthukaruppan	Head of Distribution & Client Data Platforms	Nuveen
Bryan	Paisley	Data Analytics & Administration	VanEck
Ankita	Park	Digital Marketing Manager	Diamond Hill
Gabriel	Parras	Distribution & Marketing Data Intelligence	Thornburg
Nicholas	Phillips	Associate Consultant	ZS Associates
Greg	Piaseckyj	Head of Sales	SalesPage
Matthew	Powers	Distribution Operations & BI	John Hancock
Ellen	Powers	Distribution Enablement Product Manager	Allspring Investments
John	Pumphrey	Director Sales Enablement Solutions	SalesPage
Chris	Rahimian	Director - Sales	Broadridge
Paul	Raytsen	CRM Manager	Invesco
Annabel	Redisch	Scribe/Notetaker	SME Forum
Steve	Reilly	Head of Digital Experience	Lord Abbett



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Jeff	Robinson	Director of Sales Intelligence	Envestnet Asset Man
Matthew	Roche	Finance, HCM & Client Data Technology	Neuberger Berman
Jon	Rosenberg	MD CRM & Client Data Insights	Nuveen
Buddy	Rush	Senior Director - Asset Management	eVestment
William	Schmidt	Product Manager	eVestment
John	Scuzzarella	VP Data Intelligence	Natixis
Uri	Shanske	Director of Client Insights & Analysis	American Century
Bill	Sheldon	Senior Vice President	MarketBridge
Michael	Shin	Senior Associate	New York Life
William	Shockley	Director	Salesforce
Julie	Smith	VP, Fund Administration & Operations	Touchstone Funds
Nathan	Stevenson	CEO / Founder	ForwardLane
Joe	Stewart	Director, Sales Enhancement	GQG Partners
James	Strojwas	Product Lead	XALT / Puregroup
Mark	Summers	Senior Specialist	eVestment
Lance	Suttle	Director, Digital Strategy	GQG Partners
Leah	Swanson	Director of Strategic Relationships	Thornburg
Scott	Vallina	Manager, Client Engagement Center	Federated Hermes
Anthony	Vitalone	Global Digital & Marketing Operations	Van Eck
David	White	Intermediary Distribution Administration	Eaton Vance Distributors
Eric	Wilson	Product Owner - Finance	American Century
Tom	Yen	Lead - New Initiatives	Hey DAN
Kate	Zeid	SVP	Hey DAN

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