

## Spring 2023 Forum Scottsdale, Arizona Attendees

Updated April 12, 2023

| <u>First Name</u> | <u>Last Name</u> | <u>Company</u>               | <u>Title/Role</u>                                       |
|-------------------|------------------|------------------------------|---|
| Cameron           | Afkhami          | Ares Management              | AVP AWMS Systems  |
| John              | Aguilar          | Neuberger Berman             | SVP, Head of Intermediary Marketing                     |
| Reid              | Anderson         | ISS Market Intelligence      | VP, ISS MI Sales  |
| Trey              | Arnett           | Nuveen                       | VP, Head of Global CRM                                  |
| Clay              | Attebery         | eVestment                    | Senior Vice President                                   |
| Mario             | Barbato          | MGB Consulting               | Principal   |
| Corey             | Beckerman        | Voya                         | SVP- Distribution Data, Intelligence & Sales Enablement |
| Diana             | Blaney           | SS&C Technologies            | WalletShare, Product Management & Client Relations      |
| Chris             | Brunner          | Diamond Hill                 | Director - Marketing                                    |
| Ken               | Burd             | Principal Asset Management   | Managing Director, Distribution Enablement & Analytics  |
| Allana            | Burke            | SS&C Technologies            | Senior Sales Executive                                  |
| Brennan           | Burkhart         | Kyloe                        | Founder   |
| Anthony           | Busacca          | The SME Forum                | Advisor   |
| Xin               | Chen             | Salesforce                   | Solution Engineer                                       |
| Inderjit          | Chhatwal         | The SME Forum                | Facilitator   |
| Teresa            | Chuang           | John Hancock / Manulife      | Head of Global Client Engagement, Public Markets        |
| Ric               | Costa            | Pacific Funds                | Managing Director, Head of Distribution, Funds          |
| Terry             | Crady            | Ares Management              | VP, Technology; AWMS Systems                            |
| Abhijeet          | Dalvi            | Natixis Investment Managers  | SVP, Enterprise Applications Technology                 |
| Matt              | Dimler           | PIMCO                        | Senior Vice President, Strategy                         |
| Jo-ann            | DiSantis         | PGIM Fixed Income            | VP, Sales & Marketing Technology                        |
| Brian             | Donnelly         | Lazard Asset Management      | SVP, Head of Sales Technology                           |
| Rachel            | Dorris           | Principal Asset Management   | Director, Client Analytics                              |
| Beverly           | Dube             | SalesPage                    | Director, Platform Product Manager                      |
| Julian            | Edelman          | The SME Forum                | Head of Research  |
| Aric              | Faber            | SalesPage                    | President   |
| Michelle          | Feinstein        | Salesforce                   | GM Wealth & Asset Management                            |
| Bill              | Finnegan         | Broadridge                   | Principal   |
| Loren             | Fox              | FUSE Research Network        | Director of Research                                    |
| Preston           | Galarneau        | Manulife Investments         | Head of Global Institutional CRM Services               |
| Dennis            | Gallant          | ISS Market Intelligence      | Associate Director                                      |
| Mario             | Gallotto         | State Street Global Advisors | VP - Business Intelligence Operations                   |
| Hazem             | Gamal            | The SME Forum                | COO   |
| Liz               | Gamal            | The SME Forum                | The Boss  |
| Neelima           | Gollapudi        | PGIM                         | Director  |
| Jeremy            | Goss             | SalesPage                    | PMO Director  |

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| Rachel            | Gryziak          | Goldman Sachs               | Strategy Associate                             |
| Jack              | Hanifee          | The SME Forum               | Scribe   |
| Marianne          | Hewitt           | The Growth Strategy Group   | Growth Strategist                              |
| Chris             | Howard           | eVestment                   | Director, Senior Relationship Manager          |
| Chris             | Jackson          | Federated Hermes            | Vice President, Advanced Analytics & BI        |
| Jacqueline        | Jeffrey          | The SME Forum               | Senior Associate                               |
| Philippe          | Johansson        | Natixis Investment Managers | Associate Data Analyst                         |
| Scott             | Kasper           | Olmstead Associates         | Manager of Customer Engagement                 |
| Ben               | Knopf            | Janus Henderson             | Distribution Strategy and Competitive Insights |
| Daniel            | Knoth            | New York Life Investments   | Director - Sales Analytics                     |
| Hari              | Krishnaswami     | Ridgeway Partners           | Managing Director                              |
| Dave              | Kriz             | Hey DAN                     | Head of Strategy                               |
| Michael           | Lampa            | GDM Innovation Labs         | Co-Founder / Chief Analytics Officer           |
| Austin            | Lewis            | Olmstead Associates         | Manager of Customer Engagement                 |
| Brian             | Luong            | Pacific Funds               | Sr. Business Analyst                           |
| Chris             | Makkreel         | Salesforce                  | Director Solution Engineering                  |
| Justin            | Mangera          | ZS Associates               | Consultant                                     |
| Browning          | Mank             | ForwardLane                 | Strategic Business Development                 |
| Mike              | Mattera          | Voya                        | VP, Enablement & Product Management            |
| Alissa            | McBain           | Principal Asset Management  | Data Scientist                                 |
| Kenneth           | McColl           | Kyloe                       | Founder  |
| Michael           | McKeigue         | TortoiseEcofin              | Head of Business Development                   |
| Sylvia            | Merich           | Janus Henderson             | CRM Strategy & Solutions Manager               |
| Kelly             | Moore            | Putnam Investments          | Manager, Digital Enablement                    |
| Erin              | Moschos          | Acadian Asset Management    | Business Manager                               |
| Leah              | Mullen           | Putnam Investments          | Director, Distribution Strategy and Analytics  |
| Patrick           | Murphy           | XALT                        | Founder  |
| Arun              | Muthukaruppan    | Nuveen                      | Head of Sales Technologies                     |
| Todd              | Neese            | The SME Forum               | Facilitator                                    |
| Michele           | O'Connor         | New York Life Investments   | Director                                       |
| Lauren            | O'Connor         | Brookfield Asset Management | Sales Strategy & Analytics, VP                 |
| Ravikanth         | Paleti           | Nuveen                      | Lead Development Manager                       |
| Gabriel           | Parras           | Thornburg                   | Director, Sales and Marketing Intelligence     |

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| Archana           | Penumatsa        | Thornburg                   | Senior CRM Administrator                          |
| Nicholas          | Phillips         | ZS Associates               | Consultant  |
| Greg              | Piaseckyj        | SalesPage                   | Head of Sales                                     |
| Ryan              | Porter           | Revenue Grid                | EVP of Sales                                      |
| Ellen             | Powers           | Allspring                   | Sales Enablement                                  |
| Kevin             | Rosenfeld        | The SME Forum               | Facilitator                                       |
| Rhonda            | Ross             | Aristotle                   | Salesforce Senior Business Analyst                |
| Timothy           | Ryan             | Vanguard                    | Data Manager                                      |
| Ruben             | Sanchez          | Janus Henderson             | Director, Distribution Analytics & Reporting      |
| John-Paul         | Sansone          | Revenue Grid                | Strategic Account Executive                       |
| Brett             | Schechterman     | FLX Networks                | CPO   |
| John              | Scuzzarella      | Natixis Investment Managers | VP Data Intelligence                              |
| Michele           | Shauf            | eVestment                   | Head of Client Education                          |
| Brian             | Shaw             | MFS                         | Senior Business Strategist                        |
| Bill              | Sheldon          | MarketBridge                | Senior Vice President                             |
| Jeremy            | Sia              | PIMCO                       | Manager   |
| Ranjan            | Sinha            | Axis Group                  | President   |
| Julie             | Smith            | Touchstone Funds            | Vice President                                    |
| Dan               | Sondhelm         | Sondhelm Partners           | CEO   |
| Scott             | Spaulding        | LPL Financial               | VP, Sales Enablement                              |
| Tim               | Stegner          | The SME Forum               | Associate   |
| Nathan            | Stevenson        | ForwardLane                 | CEO and Founder                                   |
| Jeff              | Strange          | SS&C Technologies           | Strategic Business Consultant                     |
| Michael           | Tipton           | ISS Market Intelligence     | VP, Key Accounts                                  |
| Scott             | Vallina          | Federated Hermes            | Vice President/ Manager, Client Engagement Center |
| Vibhu             | Walia            | MGB Consulting              | Machine Learning Director                         |
| Megan             | Weber            | Invesco                     | Data Delivery Product Owner                       |
| Hosein            | Yeh              | PIMCO                       | SVP, Business Strategy and Analytics              |
| Kate              | Zeid             | Hey DAN                     | Senior Vice President                             |