

Attendees

<u>First Name</u>	<u>Last Name</u>	<u>Title/Role</u>	<u>Firm</u>
Stephen	Alepa	CEO	Olmstead Associates
Nick	Alfier	Head of Asset Manager Relationships	BNY Mellon
Mike	Alt	Head of Sales Intelligence & Insights	T. Rowe Price
Neeraj	Arora	Consultant	Aggrani
Mario	Barbato	Owner / Consultant	MGB Consulting
Blake	Barry	AVP Distribution Intelligence	Morgan Stanley
Corey	Beckerman	SVP, Distribution Data, Intel & Enablement	Voya
Whitney	Bell	SVP, Head of Funds Marketing	Aristotle
Lindy	Belley	Sr. Marketing Manager, Financial Services	HSO
Tom	Berger	VP, Financial Services	HSO
Matthew	Brady	Director, US Intermediary Marketing	Invesco
Theresa	Brennan	Head of Global Distribution Enablement	T. Rowe Price
Tom	Bruno	Director, Global Product Management	SalesPage Technologies
Brennan	Burkhart	Founder	Kyloe
Maureen	Byrne	Director, Marketing	FLX Networks
Jill	Camper	Head of Data Governance	SS&C
Lucinda	Candal	Head of Sales & Marketing Enablement	Thornburg
Neal	Carlson	Data Architect	Neuberger Berman
Wil	Chacon-Miller	Data Analyst	Nuveen Investments
Ashwin	Chadaga	Analytics Lead	Vanguard
Inder	Chhatwal	Facilitator	SME Forum
Jae	Cho	Business Intelligence Analyst	VanEck Associates
Dan	Clark	SVP, Head of Inside Sales & Data Analytics	Amundi US
David	Cocks	Director, Data Strategy	Amundi US
Doug	Cordero	Vice President	Druva
Matthew	Cressy	Head of Relationship Management	SS&C
John	D'Amaro	Associate Data Analytics	FS Investments
Jessica	DeLeo	Head of Sales Enablement Tools	State Street Global Advisors
Jo-ann	DiSantis	VP, Sales & Marketing Tech	PGIM
David	Dishuk	VP, Information Technology	AMG
Brian	Donnelly	SVP, Head of Sales Technology	Lazard Asset Management
Rachel	Dorris	Director, Digital Enablement & Analytics	Principal Asset Management
Jeff	Dupree	Client Relation Specialist - WalletShare	SS&C
Stephen	Edwards	VP, Distribution Intelligence	AMG
Richard	Ellard	VP, Relationship Manager	Morgan Stanley
Russell	Elliott	Head of AM Market Intelligence	Nasdaq eVestment
Aric	Faber	President	SalesPage Technologies
Adam	Feldstein	Associate Director, Product Engagement	Iss Market Intelligence
Bill	Finnegan	Principal	Broadridge
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Attendees

Loren	Fox	Director of Research	FUSE Research Network
Patrick	Frame	Divisional Sales Manager	JP Morgan
Carolyn	Gallagher	Senior Marketing Associate	JP Morgan
Dennis	Gallant	Associate Director	ISS Market Intelligence
Hazem	Gamal	COO	SME Forum
Liz	Gamal	The Boss	SME Forum
Nicholas	Garza	Senior Analyst & CRM Product Owner	Calamos Investments
Kristen	Gelwick	SVP, Global Client Group Strategic Initiatives	Acadian Asset Management
Rishab	Ghose	Business Intelligence Analyst	First Eagle Investments
Paul	Gillis	Salesforce Business Analyst	Acadian Asset Management
Neelima	Gollapudi	VP, Sales & Marketing Technologies	PGIM
Satyanarayana	Gorintla	Senior Product Manager	Salesforce
Vince	Grogan	Senior Marketing Strategist	GRO Consulting
Lindsey	Hanson	Head of Client Service Technologies	Income Research & Management
Scot	Hawthorne	Head of CRM Strategy & Sales Enablement	Alliance Bernstein
John	Ho	Executive Director	JP Morgan
Barney	Holmes	Partner	Meritus Business Solutions
Adam	Horowitz	CRM Business Analyst	Carlyle Group
William	Hortz	Founder & Dean	Institute for Innovation Dev.
Adam	Hyams	Director, Business Intelligence	New York Life Investments
Lakshmi	Indukuri	CTO, Distinguished Enterprise Architect	Salesforce
Jacqueline	Jeffrey	Senior Associate	SME Forum
Jon	Jerrild	Business Analytics Lead	Neuberger Berman
Philippe	Johansson	Data Intelligence Analyst	Natixis Investment Managers
Christopher	Johnson	Director, Distribution Enablement	Harbor Capital Advisors
Nick	Jubb	Enablement Leader	SME Forum
Scott	Kasper	Manager, Client Engagement	Olmstead Associates
James	Keenan	Digital Strategy	AMG
Jeremy	Kees	Director, Senior Relationship Manager	Merrill Lynch
Sheila	Kelleher	Business Systems Analyst	PGIM
Daniel	Knoth	Director, BI & Data Analytics	New York Life Investments
Sri	Kovela	Assistant Vice President	Neuberger Berman
Lee	Kowarski	Head of Distribution Solutions	SS&C
Dave	Kriz	VP, Head of Sales & Strategy	Hey DAN Voice to CRM
Ryan	Kubie	Head of Client Information Services	Lord Abbett
Missy	Lankard	Senior Business Intelligence Analyst	Alliance Bernstein
James	Lattanzio	Customer Engagement Leader	Kyloe
Chris	Lengle	US Client Director	XALT
Michelle	Liller	Senior Vice President	Lazard Asset Management

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Randy	Lukas	Senior Associate	New York Life Investments

Attendees

Brian	Luong	AVP Reporting	Aristotle
Sibel	Macfarlan	Director, Wealth Solutions	BNY Mellon
Alyson	Magrane	Sales Reporting & Data Analytics	Amundi US
Asad	Mahmood	VP, Data & Analytics	HSO
Tim	Mak	Head of Global Sales Infrastructure	State Street Global Advisors
Bijoy	Maliakal	VP-Data & Analytics	Alliance Bernstein
Browning	Mank	CRO & Head of Strategic Relationships	ForwardLane
David	Master	Management & Marketing Consultant	SME Forum
Jessica	Maynard	Fund Operations Manager	Touchstone Funds
Kenny	McColl	Founder	Kyloe
William	McCrea	Managing Director, CDO	FS Investments
Jessica	McQuillan	Lead Business Enablement Partner	Franklin Templeton
Justin	Meyer	Director, Head of Sales & Marketing Tech	Lazard Asset Management
John	Miller	Head of Sales Execution	Allspring
Larry	Molinelli	Marketing Manager	Robeco
Dyfrig	Mon	Analytics Manager	Vanguard
Bradley	Moore	Director, Head of Growth Dynamics	BNY Mellon
Kelly	Moore	Manager, Digital Enablement	Putnam Investments
Erin	Moschos	SVP, Business Manager	Acadian Asset Management
Leslie	Motiwalla	Head of Marketing & Communications	CBRE Investment Management
Leah	Mullen	Director, Distribution Strategy & Analytics	Putnam Investments
Robert	Mulligan	Business Intelligence Analytics Lead	Neuberger Berman
Patrick	Murphy	Founder	XALT
Arun	Muthukaruppan	Head of Sales Technologies	Nuveen Investments
Emily	Nourse	Sales Strategy & Enablement Associate	Goldman Sachs
Jolie	O'Brien	Analyst	Morgan Stanley
Ariel	Olsson	Distribution Reporting & Outcome Analysis	Janus Henderson Investors
Peter	Onghena	Client Services / Portfolio Analytics	Tweedy, Browne
Emily	Pachuta	Marketing, Data & Analytics	
Bryan	Paisley	VP, Data Analytics & Administration	VanEck Associates
Gabriel	Parras	Director, Sales & Marketing Intelligence	Thornburg
Sharlene	Patterson	Senior Associate	Aristotle
Suzy	Peffer	Head of Global Business Analytics	State Street Global Advisors
Pete	Petersen	CTO, CCSO	Causeway Capital Management
Greg	Piaseckyj	Head of Sales	SalesPage Technologies
Chris	Pini	Head of Account Management NA	ISS Market Intelligence
Cheryl	Pipia	Head of Global Sales Management	T. Rowe Price
Prathibha	Prabakaran	Enterprise Data Arch & Strategy	Voya

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Prathibha	Prabakaran	VP - Data Architecture and Strategy	Voya Financial
Alysha	Ramnitz	VP, Sales Enablement	Carlyle Group

Attendees

Maggie	Raymond	VP, Client Service Strategy	Income Research & Management
Amanda	Robinette	Director, Distribution Administration	Diamond Hill
Mary Pat	Roenbeck	National Sales Manager	BlackRock
Jon	Rosenberg	MD CRM & Client Data Insights	SME Forum
Rhonda	Ross	Senior Salesforce Business Analyst	Aristotle
Perry	Rotella	Managing Director, Financial Services	Box
Timothy	Ryan	Manager, Data Operations	Vanguard
Joseph	Schwartzbach	Director, Model Portfolio Specialist	WisdomTree
John	Scuzzarella	VP, Distribution Enablement	Natixis Investment Managers
Drew	Seelig	Global Wealth & Asset Man. Solutions	Salesforce
Michele	Shauf	Head of Education & Experiences	Nasdaq eVestment
Rich	Smith	COO - Global Distribution	American Century
Mark	Smith	ED, Distribution Intelligence	Morgan Stanley
Maximilian	Sparshatt	Analyst	Nuveen Investments
Keith	Stecker	Head of Internal Sales	SME Forum
Nathan	Stevenson	CEO	ForwardLane
Sheri	Sussman	VP, CRM Analytics Manager	First Eagle Investments
Leah	Swanson	Director, Sales & Marketing Enablement	Thornburg
Shankar	Venkateswaran	Director, Sales Technologies	VanEck Associates
Jason	Verses	Director, Business Intelligence	Alliance Bernstein
Jodi	Wagner	Asset Management Solution Specialist	Salesforce
Kathryn	Walker	CRM Business Analyst, Sales Enablement	Artisan Partners
Davis	Walmsley	Principal	Broadridge
Jamie	White	MAM CRM Product Owner	Macquarie
Simeon	Wilson	Digital Marketing & Analytics Lead	Causeway Capital Management
Michael	Winnick	President	AdvisorTarget
Jane	Yue	Director of sales analytics	Invesco
William	Zarbock	Co-Founder	Meritus Business Solutions