



**DELIVERING ACTUAL INTELLIGENCE:
PURSUING BUSINESS VALUE**
Charlotte, NC: May 13 – 15, 2024



First Name	Last Name	Company	Title/Role
Neeraj	Arora	SME Forum	Facilitator
Stephanie	Aument	Sands Capital	Senior Manager, Marketing Operations
Vasily	Barankevich	Virtus Investment Partners	Business Intelligence - Power BI Developer
Mario	Barbato	SME Forum	Facilitator
Chanel	Bardaro	MFS	Sr. Consultant, Business Capabilities
Corey	Beckerman	SME Forum	Facilitator
Tom	Berger	HSO	VP, Financial Services
Abigail	Bodner	Brookfield	Associate
Jeff	Bricco	Baird	SVP, Equity AM, Data & Technology Analyst
Lana	Brkic	White Marble Consulting	Marketing Consultant
Phillip	Brooks	Neuberger Berman	SVP/Head of Sales & Marketing Enablement
Sam	Browning	TIFIN AMP	Head of Strategic Partnerships
Allana	Burke	SS&C	Relationship Manager
Brennan	Burkhart	Kyloe	Founder
Tony	Busacca	SME Forum	Facilitator
Maureen	Byrne	SME Forum	Facilitator
Steve	Casey	Franklin Templeton	Market Leader
Jin	Cheung	Invesco	Associate Director, Sales Analytics
Carter	Cikovic	Brookfield	Associate
Dan	Clark	Amundi US	SVP, Inside Sales & Data Analytics
David	Cocks	Amundi US	Director Data Strategy
Brett	Cohen	Janus Henderson Investors	Director
Danielle	Coletto	Invesco	User Engagement Specialist
Grace	Crawford	Wellington Management	Head of Sales Strategy & Enablement
Alec	Crawford	Artificial Intelligence Risk	CEO
Andrew	Dennison	Franklin Templeton	Director, Distribution Intelligence
Matthew	Dimler	PIMCO	SVP - Strategy
Brian	Donnelly	Lazard	SVP, Head of Sales Technology
Scott	Dorman	Artisan Partners	Associate Director
Rachel	Dorris	Principal Asset Man	Dir, Distribution Enablement & Analytics
John	Driscoll	Davis Advisors	Director, Davis Advisors
Aarik	Eberhardt	Centric Consulting	Business Development Executive
Julian	Edelman	SME Forum	Head of Research
Stephen	Edwards	AMG	VP - Distribution Intel & Sales Ops
Aric	Faber	SalesPage	President
Kevin	Faranetta	NY Life Investments	Director, Finance
Matt	Feeney	Broadridge	Associate Principal



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First Name	Last Name	Company	Title/Role
Kevin	Ferry	Natixis	VP, Data Governance & Data Ops
Loren	Fox	FUSE Research	Director of Research
Amy	French	Diamond Hill	Sr. Business Systems Analyst
Sal	Gagliano	TIFIN AMP	CEO
Dennis	Gallant	ISS Market Intelligence	Associate Director
Hazem	Gamal	SME Forum	COO
Kristin	Gibson	AdvisorTarget	COO
Danius	Giedraitis	JPMorgan Asset Man	Global Head of BI & Analytics
Tom	Gisondi	Sterling Capital Man	Head of Information Technology
Jean	Goodwin	Synthesis Technology	VP North American Sales
Zack	Helgeson	Nasdaq eVestment	Head of Product Strategy, Analytics
John	Ho	JPMorgan Asset Man	Executive Director
Blake	Hood	Principal Asset Man	Sr. Director - Wealth Advisory Solutions
Bill	Hortz	Institute Innovation Development	Founder & Dean
Chris	Howard	Nasdaq eVestment	Client Success
Kourtney	Hutson	Lazard	Business Analyst
Chris	Jackson	Federated Hermes	Asset Ret & Sales Analytics Manager
Philippe	Johansson	Natixis	Data Intelligence Analyst
Scott	Kasper	SalesPage	Senior Solutions Analyst
Venkat	Kommerer	VanEck	Director Marketing Technologies
Kishore	Kothandaraman	Goldcast	Co-founder
Lee	Kowarski	SS&C	Head of Distribution Solutions
Dave	Kriz	Hey DAN	VP, Global Head of Sales & Strategy
Ryan	Kubie	Lord Abbett	Head of Client Information Services
Missy	Lankard	AllianceBernstein	Senior BI Analyst
Tom	Larson	SalesPage	Director of Business Development
Chris	Lengle	XALT	US Client Director
Austin	Lewis	Olmstead	Manager of Customer Experience
Robert	Lewis	Broadridge	Senior Account Executive
Craig	Lieb	Invesco	Director CRM, Sales & Marketing Enablement
Avery	Martin	Acuity KP	Business Development
David	Master	SME Forum	Facilitator
Kenny	McColl	Kyloe	Founder
Jacob	McConnell	BNY Mellon	CRM Dir, Treasury Svs Enablement & Strategy
Jeff	Mehi	Franklin Templeton	Director - Distribution Intelligence
Nathan	Miller	Diamond Hill	Senior Data Strategist
Erin	Moschos	Acadian Asset Management	SVP, Business Manager



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**SME
THE FORUM**

First Name	Last Name	Company	Title/Role
Jim	Moyer	VanEck	Director, Digital Transformation
Patrick	Murphy	XALT	Founder
Shamanth	Murthy	Tiger Analytics	Director, Analytics Consulting
Todd	Neese	SME Forum	Facilitator
Christopher	Nguyen	PIMCO	Data Analytics - Sales Strategy
David	Nicholas	SS&C	Product Manager
Joe	O'Connell	Golub Capital	Vice President - Data Management
Peter	Onghena	Tweedy, Browne	Transformation Architect
Bryan	Paisley	VanEck	VP Data Analytics & Administration
Kondilia	Parissi	First Eagle Investments	Head of Instit'l & IWS Business Management
Gabriel	Parras	Thornburg Investment Man	Director, Sales & Marketing Intelligence
Allison	Pence	Sterling Capital Man	Head of Marketing & Communications
KimChu	Perrington	AllianceBernstein	Director/Strategic Sales Manager
Ashley	Piccolo	Acuity KP	Associate Director, Bus Development
Kelsey	Pool Kean	Principal Asset Man	Sr. Distribution Enablement Strategist
Nichole	Purfeerst	Russell Investments	Director of Sales Operations
Jeff	Robinson	Envestnet	Sales Intelligence & Analytics Director
Alexandra	Row	Diamond Hill	Data Analyst
Buddy	Rush	Nasdaq eVestment	Senior Director - Asset Management
Bill	Safarik	Wellington Management	Dir, Client Data & Analytics/Sales Enable
Ruben	Sanchez	Janus Henderson Investors	Director, Distribution Analytics & Reporting
Carly	Schrager	Blueprintx	Head NA Marketing Automation
Angela	Sell	Baird	Director of Business Operations
Anjali	Shah	BNY Mellon	Chief Commercial Officer, Treasury Services
Michael	Shin	NY Life Investments	Business Intelligence
Mark	Shpizner	Centerbridge Partners	Head of Sales Strategy & Execution
Martin	Soderbloom	Nuveen	Associate, Distribution Analytics & Reporting
Nathan	Stevenson	ForwardLane	CEO
Joe	Stewart	GQQ Partners	Director, Distribution Enablement & Analytics
Sophia	Stone	Sands Capital	Client Relations & Project Analyst
Manish	Suthar	Straive	SVP, Analytics & AI
Leah	Swanson	Thornburg Investment Man	Director of Sales & Marketing Enablement
Gabriel	Tan	JPMorgan Asset Man	Head of North America Business Intel.
John	Toepfer	Synthesis Technology	CEO
Jonathan	Tripple	HSO	Cloud Sales Executive
Emilio	Vastola	SME Forum	Facilitator
Shankar	Venkateswaran	VanEck	Director Sales Technologies



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Kathryn	Walker	Artisan Partners	Sales Enablement Associate
Davis	Walmsley	Broadridge	Head of US Solutions
Wei	Wang	NY Life Investments	Director AI & Data Science
Mark	Weldon	Golub Capital	Associate Director - Data Management
David	White	MSIM/Eaton Vance	ED, Distribution Strategy & Analytics
Anthony	Whitford	Olmstead	MD, Head of Data Management
Melrose	Wild	ForwardLane	Chief Revenue Officer
Kate	Zeid	Hey DAN	Senior Vice President