

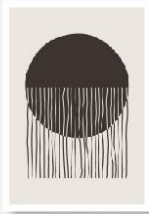
## INNOVATION AS ART: EVOLVING TO IMPROVE

Kansas City, MO: October 21-23, 2024



### Attendees

<u>First Name</u>	<u>Last Name</u>	<u>Title/Role</u>	<u>Company</u>
Cameron	Afkhami	VP, Wealth Management Data Strategy	Ares Management
Anthony	Armstrong	AVP, Operations Data Management	Voya IM
Neeraj	Arora	Facilitator/Speaker	SME Forum
Mario	Barbato	Facilitator/Consultant	SME Forum
Meaghan	Baus	Associate	Brookfield
Whitney	Bell	SVP, Head of Fund Marketing	Aristotle Capital Management
Lindy	Belley	Sr. Marketing Manager	HSO
Melissa	Bensouda	VP, Business Systems Analyst	PIMCO
Vijay	Bhusari	Director, Sales and Client Data Strategy	T. Rowe Price
Krista	Bowers	Executive Director, Sales Strategy & Analytics	FS Investments
Julie	Burroughs	Data Practice Principal	Hike2
Anthony	Busacca	Facilitator/Consultant	SME Forum
Maureen	Byrne	Facilitator/Consultant	SME Forum
Jill	Camper	Head of Data Governance	SS&C
Neal	Carlson	Business Architect	Neuberger Berman
Dan	Caron	VP, Enterprise Client Group	Nasdaq eVestment
Inderjit	Chhatwal	Facilitator/Consultant	SME Forum
Dan	Clark	Head of Inside Sales and Sales Enablement	Amundi US
David	Cocks	Director Data Strategy	Amundi US
Ric	Costa	Managing Director	Aristotle Capital Management
Gretchen	Cox	Product Manager	SS&C
Terry	Crady	VP, Innovation & Sales Enablement	Ares Management
Alec	Crawford	CEO	Artificial Intelligence Risk, Inc.
Andrew	Dennison	Director, Distribution Intelligence	Franklin Templeton
Rachel	Dorris	Director, Distribution Enablement and Analytics	Principal Asset Management
Mark	Elliott	Data Manager	American Century Investments
William	Ellison	Vice President	Aristotle Capital Management
Aric	Faber	President & CEO	SalesPage Technologies
Kevin	Faranetta	Director, Finance	New York Life Investments
Adam	Feldstein	Associate Director, Product Engagement	ISS Market Intelligence
Brynne	Fitzgerald	Associate Data Scientist	Natixis Investment Managers
Ryan	Foreman	Associate Principal, Distribution Insights	Broadridge
Loren	Fox	Director of Research	FUSE Research Network
Heather	Frost	Sr. Business Analyst	AllianceBernstein
Karen	Fu	AVP/Senior Product Manager	Capital Group
Liz	Gamal	The Boss	SME Forum



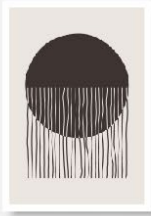
## INNOVATION AS ART: EVOLVING TO IMPROVE

Kansas City, MO: October 21-23, 2024



### Attendees

<u>First Name</u>	<u>Last Name</u>	<u>Title/Role</u>	<u>Company</u>
Hazem	Gamal	COO	SME Forum
Nicholas	Garza	Sr. Analyst Developer/CRM Product Owner	Calamos Investments
Rishab	Ghose	Business Intelligence Analyst	First Eagle Investments
Kristin	Gibson	VP, Client Engagement	Broadridge
Paul	Gillis	Sr Salesforce Business Analyst	Acadian Asset Management
Alexander	Golub-Sass	Principal, Distribution Insight	Broadridge
Echo	Gonino	Product Owner	SS&C
Doug	Grunst	Business Analytics Director	Allspring Global Investments
Zdenka	Guadarrama	Prof. Math, Analytics & Tech.	Rockhurst University
Nisha	Gujral	AVP, Digital Marketing	Aristotle Capital Management
CJ	Haas	Vice President	Goldman Sachs AM
Hugh	Head	Client Engagement - Off Platform Data Apps	Nasdaq eVestment
Zack	Helgeson	Head of Product Strategy, Analytics	Nasdaq eVestment
Keith	Herbert	VP, Business Management & Strategy	Ares Management
Carmen	Hui	Business Intelligence Sr Associate	NY Life Investments
Amala	Jatar	Product Manager	Principal Asset Management
Scott	Kasper	Solutions Consultant	SalesPage Technologies
Michelle	Khoury	AVP, Operations Manager	VOYA
Oli	Knight	Director of Innovation	Fundamental Group
Lee	Kowarski	Head of Distribution Solutions	SS&C
Stephanie	Lamb	VP, Bus. Intel. & Prospect Management	Jennison Associates
Chris	Lane	Director of Business Intelligence	John Hancock
Tom	Larson	Director of Business Development	SalesPage Technologies
Jim	Lattanzio	VP Product Development	Kyloe Digital
Chris	Lengle	Managing Director - US Client Group	XALT
Austin	Lewis	Manager of Client Experience	Olmstead
Morgan	Llewellyn	Principal, Director AI & Innovation	Hike2
Danielle	Lowe	Business Analyst	Janus Henderson
Brian	Luong	AVP, Reporting	Aristotle Capital Management
Brendan	Mannix	Business Strategist	MFS Investment Management
Kenny	McColl	Founder	Kyloe Digital
Colin	McCombs	Sales Enablement Associate	Artisan Partners
Jessica	McQuillan	Lead Business Intelligence Analyst	Franklin Templeton
Jeff	Mehi	Head of Wealth Partnerships	TIFIN
John	Mendler	Head of Global CRM	BNY
Chad	Meyer	Data Strategist	MFS Investment Management
Erin	Moschos	SVP, Business Manager	Acadian Asset Management



## INNOVATION AS ART: EVOLVING TO IMPROVE

Kansas City, MO: October 21-23, 2024



### Attendees

<u>First Name</u>	<u>Last Name</u>	<u>Title/Role</u>	<u>Company</u>
Joshua	Newton	Director, Sales Enablement	T. Rowe Price
Lyndsay	Noble	Facilitator	SME Forum
Joseph	O'Connell	VP, Investor Partners Group	Golub Capital
Peter	Onghe	Transformation Architect	Tweedy, Browne
Gabriel	Parras	Director, Sales and Marketing Intelligence	Thornburg
Sumanjit	Paul	VP, ETL Architect & Development Manager	AllianceBernstein
Jonathan	Pena	Data Scientist	First Eagle Investments
KimChu	Perrington	Director, Strategic Sales Manager	AllianceBernstein
Kelsey	Pool Kean	Sr Dist. Enablement & Analytics Strategist	Principal Asset Management
Ellen	Powers	Head of CRM Platform and Sales Data	Allspring Global Investments
Chris	Rahimian	Director of Sales	Broadridge
Elena	Relic-Lytle	Principal, Data Science	Broadridge
Rhonda	Ross	Senior Salesforce Business Analyst	Aristotle Capital Management
Tori	Rowley	Distribution Enablement & Analytics Strategist	Principal Asset Management
Jessica	Rubin	Sr Analyst, Dist. Strategy & Competitive Insights	Janus Henderson
Bill	Safarik	Director, Sales Enable./Business Intel.	Wellington Management
Kevin	Sawchuk	Head of Distribution Business Intelligence	Allspring Global Investments
Valerie	Schopmann	Digital Enablement Manager	Thornburg
Domenic	Sciarra	GotoMarket Operations Global Capabilities	Capital Group
Mark	Shpizner	Head of Sales Strategy & Execution	Centerbridge Partners
Kuldeep	Singh	Director & Chief Data Officer	Hike2
Jule	Smith	Vice President	Touchstone
Tanyanan	Sophon-Itthiwat	VP, Reporting & Analytics	Lazard Asset Management
Maximilian	Sparshatt	Founder	WealthVista
Leah	Swanson	Facilitator	SME Forum
Kaylin	Tabbah	Business Strategist	PIMCO
Julie	Terres	Senior Director, Client Solutions Intelligence	CBRE Investment Management
JT	Tripple	Microsoft Cloud Specialist	HSO
Alex	Uzumcu	AVP, Sales Analytics & Reporting	Brookfield
Katie	Vavak	Manager Client Relations	SS&C
Amy	Vicenzi	Distribution Consultant	Natixis Investment Managers
Jonathan	Wang	CTO	VanEck Associates
Mark	Weldon	Head of Data Management	Golub Capital
Hosein	Yeh	SVP, Business Strategy & Analytics, US Wealth	PIMCO
Kate	Zeid	Senior Vice President	Hey DAN