



**EVOLUTION IN A REVOLUTION:  
HOW WE ADAPT AND ADOPT**  
New Brunswick, NJ: April 21 - 23, 2025



First Name	*Last Name*	Firm	Role
Daniel	Alexander	SS&C	Head of Analytics
Trey	Arnett	Nuveen	VP Sales Enablement
Wyatt	Bales	Blueprintx	Chief Customer Officer
Diogenes	Balsam	State Street Global Advisors	VP of Data Intelligence
Mario	Barbato	SME Forum	Facilitator
Chanel	Bardaro	MFS	Sr. Consultant, Business Capabilities
Tom	Berger	HSO	VP Financial Services
Melanie	Betty	Capital Group Companies	Digital Product Manager
Diana	Blaney	SS&C	Director, WalletShare Product Management
Diana	Bolding	Dimensional Fund Advisors	Manager, Business Data
Jim	Bretschneider	HSO	EVP, Solutions
Chris	Brunner	Diamond Hill	Director - Digital Platform
Tom	Bruno	SalesPage	Director of Market Strategy
Brennan	Burkhart	Kyloe	Founder
Anthony	Busacca	SME Forum	Facilitator
Jin	Cheung	Invesco	Director of Client Analytics
Inderjit	Chhatwal	SME Forum	Facilitator
Jae	Cho	Van Eck	Business Intelligence Associate
Brent	Clepper	Nasdaq eVestment	Senior Director, Enterprise Asset Management
Phil	Cohn	Rutgers Business School	Professor of Professional Practice & Selling Lead
Kendra	Conklin	Touchstone Investments	Product Owner - CRM
Todd	Cooper	TIFIN	Chief Revenue Officer
Clinton	Correa	Thornburg	Creative Director
Alec	Crawford	Artificial Intelligence Risk	CEO
Klaudia	Czarnocka		Cross Channel Wholesaler
Kim	Danyluk	Tweedy, Browne	Content Strategist
Jessica	DeFillippo	Franklin Templeton	Lead Business Intelligence Analyst
Jo-ann	Di Santis	PGIM	VP Strategic IT Relationship Management
Matthew	Dimler	PIMCO	SVP, Business Strategy
John	Driscoll	Davis Advisors	Director
Kyle	Ebbets	Fintx	Senior Vice President, Operations
Stephen	Edwards	AMG	VP Distribution Intelligence
Rich	Ellard	BNY	Head of Sales Enablement
William	Ellison	Aristotle Capital Management	SVP - Sales & Marketing Technology
Aric	Faber	SalesPage	President
Chris	Fazio	AMG	Senior Project Manager



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Brynne	Fitzgerald	Natixis Investment Managers	Data Scientist
M.L.	Fletcher	T.Rowe Price	Northeast Divisional Manager
Loren	Fox	FUSE Research Network	Director of Research
Mario	Gallotto	SSGA	VP Markets Intelligence
Hazem	Gamal	SME Forum	COO
Liz	Gamal	SME Forum	The Boss
Paul	Gillis	Acadian Asset Management	Manager, CRM & Email Marketing
Brian	Goldberg	Lord Abbett	Data Analyst
Neelima	Gollapudi	PGIM	VP Sales & Marketing Technologies
Brian	Gorny	Broadridge, Data & Analytics	VP Service Delivery
Abby	Greenbaum	Virtus Investment Partners	Data Scientist
Calli	Greenwald	Centerbridge Partners	Senior Associate
Gokce	Hagnesten	GQG Partners	Distribution Enablement & Analytics
Zoe	Halaczinsky	First Eagle	BI Analyst
Samantha	Hill	Bridgehouse Asset Managers	AVP, Sales & Marketing
Michael	Hines	Lord Abbett	Head of Client Services Tech & Ops
Megan	Hopps	John Hancock	Divisional Sales Manager
Bill	Hortz	Institute for Innovation Development	Founder & Dean
Philippe	Johansson	Natixis Investment Managers	Distribution Consultant
Eric	Johnson	ForwardLane	President
David	Johnston	Capital Group Companies	Senior Analyst
Melat	Kassa	Ignites Research	Asset Management Analyst
James	Keenan	AMG	VP Digital Strategy
Daniel	Knoth	New York Life Investments	Director - Business Intelligence
Julia	Koller	TCW	Sales Strategy
Lynda	Koster	Growthential	Managing Director
Lee	Kowarski	SS&C	Head of Distribution Solutions
Nick	Kremer	Neuberger Berman	SVP Lead Business Technologist
Dave	Kriz	Hey DAN	VP Head of Strategy
Stephanie	Lamb	Jennison Associates	SVP Business Intel & Prospect Management
Tom	Larson	SalesPage	Director of Business Development
James	Lattanzio	Kyloe	Product Management
Aaron	Lee	BlackRock	Director of Product
Chris	Lengle	XALT	Managing Director
Austin	Lewis	Olmstead	Director of Client Experience Practice
Jason	Li	State Street Global Advisors	Business Analyst



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Lauren	Liscinsky	Aristotle Investment Services	Senior Associate, Marketing
Danny	Liu	Capital Group Companies	Product Manager - Data Integration Lead
Michael	Mattera	Voya Investment Management	Head of Distribution Enablement
Gina	McCarthy	TCW	Chief Operating Officer, Global Distribution
Kenny	McColl	Kyloe	Founder
Dominick	McPeake	Lord Abbett	Co-Head of National Sales
Jeff	Mehi	TIFIN	Head of Wealth Partnerships
Chad	Meyer	MFS	Data Strategist
Justin	Meyer	Nuveen	Man. Director - Head of Sales & Marketing Tech
Nathan	Miller	Diamond Hill	Director of Product & Strategy
Arun	Muthukaruppan	Nuveen	Head of Sales Technology
Rick	Niedt	Broadridge Financial	VP Operations
Lyndsay	Noble	SME Forum	Facilitator
Charles	Novicki	Broadridge	VP Product Management
Gary	Nussenbaum	Fiera Capital	CAO
Joe	O'Connell	Golub Capital	VP Investor Partners Group
Rafael	Oliveira	TCW	Head of Distribution Technology
Peter	Onghena	Tweedy, Browne	Chief Innovation Officer
Arjun	Pablay	Golub Capital	Associate Director
Gabriel	Parras	Thornburg	Director, Sales & Marketing Intelligence
Nichole	Purfeerst	Russell Investments	Director of Sales Operations
Francisco	Quevedo	Rutgers University	Assistant Professor
Dianna	Raedle	Deer Isle Group	CEO
Paul	Raytsen	Invesco	Principal Product Owner
Rhonda	Ross	Aristotle Capital Management	AVP Sales & Marketing Technology
Bill	Safarik	Allspring Global Investments	Head of Client Journey Management Strategy
Kevin	Sawchuk	Allspring Global Investments	Head of Distribution Business Intelligence
Carly	Schrager	Bluprintx	Head of North America Engagements
Dody	Schroth	SS&C	Sr. Client Relationship Manager
Sean	Shannahan	Lord Abbett	Business Intelligence Analyst
Rome	Sheehan	Lord Abbett	Team Lead, Client Services Technology
Michael	Shin	New York Life Investments	Director, Business Intelligence
Mark	Shpizner	Centerbridge Partners	Head of Sales Strategy & Execution
Gurinder	Singh	Handprint Partners	Founding Partner
Julie	Smith	Touchstone Funds	VP Operations & Fund Administration
Mariah	Smithey	Dimensional Fund Advisors	Senior Manager, Business Tools



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Jay	Solanki	New York Life Investments	Senior Associate
Nathan	Stevenson	ForwardLane	CEO
Joe	Stewart	GQG	Sr Director, Distribution Enablement & Analytics
Sheri	Sussman	First Eagle	VP CRM Analytics Manager
Leah	Swanson	SME Forum	Facilitator
Rohit	Talwar	PGIM Fixed Income	Director, Sales Enablement & CRM Strategy
Elaine	Tan	Lord Abbett	Sales Enablement Lead
JT	Tripple	HSO	Cloud Sales Executive
Rajan Preet	Wadhwa	SME Forum	Facilitator
Davis	Walmsley	Broadridge	Head of US Distribution Solutions
Jonathan	Wang	Van Eck	CTO
Mark	Weldon	Golub Capital	Director, Data Management
Patrick	Whittam	Dark City Digital	Creative Consultant
Sherry	Wymer	Touchstone Investments	AVP EEP Marketing Engagement
Jenny	Zhao	Janus Henderson Investors	Analyst, Distribution Strategy & Analytics