



2017GMM

General Membership Meeting

MAY 3-5 • MARRIOTT WARDMAN PARK HOTEL • WASHINGTON, DC

Attendee List by Name

Jennifer Abate	Lazard Asset Management	Paul Atkins	Patomak Global Partners
Andrew Ackerman	Wall Street Journal	James Atkinson	Henderson Global Funds
Brad Adams	Tortoise Capital Advisors, LLC	Joy Ausili	Investment Managers Series Trust
Marco Adelfio	Goodwin Procter LLP	Stephen Austin	Fidelity Investments
Marina Adshade	Saturna Capital	Peter Baird	NRS, A Division of Accuity Inc.
Greg Ahern	Sard Verbinnen & Co.	Mary Baker-Balady	J.P. Morgan
Paul Ainslie	CBIS	Ashok Bakhru	Goldman Sachs Mutual Funds
Jennifer Alabiso	Charles Schwab Investment Management	Michael Balboa	Fenimore Asset Management, Inc.
Jorge Alamillo	The Mexico Fund Inc.	Jed Balce	Charles Schwab & Co., Inc.
Rachel Aldous	Cohen & Steers	Colleen Baldwin	Voya Mutual Funds Group
Olwyn Alexander	PwC	Elizabeth Ballantine	Principal Mutual Funds
Carl Algermissen	OppenheimerFunds	Bret Bange	Delta Data
Julie Allecta	Salient	William Baribault	American Funds
Bruce Alpert	Gabelli Funds, LLC	Mark Barnard	AXA Equitable
John Alsheski	SEI	Chris Barnes	Market Strategies International
John Ammirati	Command Financial	Kent Barnes	Direxion Funds
Ted Anastasi	Fidelity Investments	Janice Barnwell	DTCC
Brandon Anderson	DST	Kathleen Barr	William Blair Funds
Neil Anderson	MFWire	Donna Barrette	Professionally Managed Portfolios
Patricia Andrews	Barrow, Hanley, Mewhinney & Strauss, LLC	Suzan Barron	Brown Brothers Harriman
Anthony Anella	SEI	Deborah Bartel	Franklin Templeton Investments
Mark Anema	Thrivent Mutual Funds	Peter Bassler	eSecLending
Vicky Angelos	Goldman Sachs Asset Management	Marguerite Bateman	Schiff Hardin LLP
Mitchell Appel	Value Line Funds	Stuart Bateman	Franklin Templeton Investments
Lesley-Anne Archibald	Baillie Gifford	Ann Torre Bates	Franklin Templeton Investments
Hugh Armstrong	PwC	Thomas Bathon	Vertical Capital Income Fund
Jane Armstrong	Artisan Partners	Tim Batluck	Vanguard
Scott Arndt	Broadridge Financial Solutions	John Baumgardner	Sullivan & Cromwell LLP
Matthew Arnett	Charles Schwab Investment Management	Jedelle Baxter	Vanguard Group
Kelly Arnold	Charles Schwab & Co., Inc.	Mike Beer	Principal Financial Group
Andy Arnott	John Hancock Investments	Antoinette Behan	The Vintage Group
Marie Aro	Aquila Distributors LLC	Natalie Bej	Vanguard Group, Inc.
Canise Arredondo	Capital Group Companies, Inc.	Katie Bell	Nationwide Financial
Will Arrington	Merrill Lynch	Rocco Benedetto	OppenheimerFunds
Anthony Artbane	Archstone Alternative Solutions Fund	Barry Benjamin	PwC
Kosta Arvanitopoulos	TD Asset Management	Lisa Benkowski	Jackson National Asset Management LLC
David Ater	Thornburg Investment Trust	Vince Bennardo	International Financial Data Services
Whitfield Athey	Delta Data	Tom Bennett	AIG

Brian Bergere	J.P. Morgan	Jamie Braverman	Invesco
Glen Bergert	ICON Funds	Joseph Bree	U.S. Bancorp Fund Services
Patrice Bergé-Vincent	ICI Global	Ian Bremmer	Eurasia Group
Ann Bergin	DTCC Wealth Management Services	Ronan Brennan	MoneyMate
Ed Bernard	T. Rowe Price	Linda Brenner	Investment Company Institute
Dorothy Berry	PMP and PNC Funds	Joseph Breslin	Forethought Variable Insurance Trust
Michael Bessel	Guardian Life	Brian Brett	American Beacon Advisors
Scott Betz	Scout Investments	Bill Broderick	Bridge Builder Trust
Sukhvinder Bhogal	T. Rowe Price	Jayson Bronchetti	Lincoln Financial Group
Jeffrey Biggar	RidgeWorth Funds	Eli Broverman	Betterment
Karin Billias	DTCC	David Brown	Principal Funds
Brooke Billick	Artisan Partners Limited Partnership	Debbie Brown	Broadridge Financial Solutions
Brian Binder	Deutsche Asset Management	David Bruhin	Vanguard
Angela Bisagna	Computershare Fund Services	Sean Brumble	Aviva Investors Americas
Mary Bishop	Stradegi Investment Management Consulting	Robert Bruno	First Eagle Funds
Laura Bissell	Okapi Partners LLC	Michael Buberl	T. Rowe Price
Brett Black	BMO Funds	Toni Bugni	Northern Trust
Charles Black	Ultimus Fund Solutions	Justin Bullion	Payden & Rygel
Geoff Black	Russell Investments	Barbara Burdett	T. Rowe Price
David Blass	Investment Company Institute	Andy Burgin	Accenture
James Bodurtha	BlackRock Funds	Allana Burke	Strategic Insight
Joe Boerio	Franklin Templeton Investments	Donald Burke	Duff & Phelps
Molly Bogan	Hartford Funds	Walt Burkley	Capital Research and Management Company
Thomas Bogle	Dechert	Marty Burns	Investment Company Institute
Gregg Boland	Harbor Funds	Robert Burns	Putnam Investments
Jeffrey Bolin	Commerce Funds	Scott Burns	Morningstar
Tracy Bollin	Principal Financial Group	Ari Burstein	Kreab
Margaret Bond	MUFG Union Bank, N.A.	Bill Bushey	T. Rowe Price
Karin Bonding	Salient Partners	Erich Butters	PwC
Jeffrey Bonnevier	Northern Trust Company	Paul Cahill	BNP Paribas
Lisa Borth	AB Investor Services	Peter Callahan	AB Global
Jennie Borum	Vanguard	Barbara Callbeck	TD Asset Management
Donald Boteler	Parnassus Funds / FAM Funds	Lynne Cannon	Sterling Capital Funds
Cynthia Boudreau	Computershare Fund Services	Marissa Capodanno	Pageant Media
Robert Boulware	Brighthouse	Jamie Caputo	Lake Avenue Capital
Paul Bourque	The Investment Funds Institute of Canada	Nick Cardello	Standard Life Investments
Dennis Bowden	Strategic Insight	Pamela Carlton	Columbia Threadneedle Investments
Stuart Bowers	DST	Lino Carnesecca	DST Systems, Inc.
Nora Bowman	eSecLending	Janice Carnicelli	TIAA
John Boyer	Voya Funds	Chris Carpenter	T. Rowe Price
Jeff Boyle	MUFG Union Bank, N.A.	David Carson	Ultimus Fund Solutions
Hazel Bradford	Pensions & Investments	Darren Carter	AQR Capital Management
Mark Bradley	Pioneer Investment Management	Andy Carthy	Donnelley Financial Solutions
Patrick Bradley	Virtus Investment Partners	Gale Caruso	Matthews Asia Funds / Pacific Life Funds
Kimberly Bradshaw	TIAA	Mark Carver	UBS Asset Management
Jason Brady	Thornburg Investment Management	Gary Casagrande	Confluence
Joe Brady	Lazard Asset Management	Henry Cashen	Blank Rome LLP
Scott Brady	Columbia Threadneedle Investments	Fran Cashman	Legg Mason
Ian Bragg	The Investment Funds Institute of Canada	Kathryn Cassidy	Goldman Sachs Mutual Funds
John Braun	BBD, LLP	Mike Castino	U.S. Bancorp Fund Services

Kyle Cazzetta AXA Equitable
 Kristen Chambers J.P. Morgan
 Matt Chambers Horizon Funds
 Rajib Chanda Simpson Thacher & Bartlett
 Marie Chandoha Charles Schwab Investment Management
 Lu Chang Angel Oak Capital Advisors
 Vanessa Chang American Funds
 Virginia Chapman NRS, A Division of Accuity Inc.
 Scott Chelton DST
 Howard Chin Baillie Gifford
 Jui-Chin Chiu Securities and Futures Bureau
 Gina Chon Reuters Breakingviews
 David Chow VanEck Vectors ETF Trust and MainStay Funds
 James Clark Putnam Investments
 Jason Clark SEI
 Kent Clark Charles Schwab & Co., Inc.
 Michael Clark Cohen & Steers Funds
 Cynthia Clarke Donnelley Financial Solutions
 Stephen Clarke NextShares Solutions LLC
 Mary Clarke-Pearson Janus Capital Management LLC
 Steve Cobb Lincoln Variable Insurance Products Trust
 Bill Coffey Vanguard
 Kelly Coffey J.P. Morgan
 Ira Cohen Valued Advisers Trust
 Jesse Cole Goldman Sachs & Co.
 Frank Colella BNP Paribas
 Jeff Coleman Fidelity Investments
 Faith Colish Neuberger Berman Funds
 Elisa Colkitt WFA Mutual Funds Operations
 Maureen Colligan ACA Compliance Group
 Marc Collins RiverNorth Funds
 Michael Collins Broadridge Financial Solutions
 Donald Colombo corfinancial
 Ann Combs Vanguard
 James Compton Ariel Investment Trust
 Maureen Conley Pax World Management LLC
 Elizabeth Conlon Broadridge Financial Solutions
 Ross Connell Brown Brothers Harriman
 Caitlin Connolly Broadridge Financial Solutions
 Stephen Connors SEI Investments
 Robert Conti Neuberger Berman Investment Advisers LLC
 Tim Conway Convergenx
 Gregory Cook J.P. Morgan
 Rhonda Cook SEI Investments
 Christopher Cooke Linedata
 John Corbisiero Morgan Stanley
 Sally Corning Thornburg Investment Trust
 Liliane Corzo Capital Research and Management Company
 Michael Cosgrove Neuberger Berman
 John Costantino State Street Global Advisors

George Costas Boston Financial Data Services
 Katie Cowley Aberdeen Asset Management
 Patricia Cox 1290 Funds / AXA
 Catherine Coyne National Quality Review
 Erika Craven Broadridge Financial Solutions
 Art Creel DST Systems, Inc.
 Matthew Cressy Compliance Solutions Strategies
 Darrell Cronk Wells Fargo & Company
 Christopher Crossan Dimensional Fund Advisors
 Kate Cullen Certified Investment Fund Director Institute
 Patrick Curtin Citibank
 Mareile Cusack Ariel Investment Trust
 Steve Cutka American Funds
 Keith Cuyar Confluence
 Daniel Cwenaar Broadridge Financial Solutions
 Brian Dalia Broadridge Financial Solutions
 Diana Daniels Goldman Sachs Mutual Funds
 Doug Dannemiller Deloitte
 Robert Darmanin Citibank NA
 Nikolaus Darsch ALPS Fund Services
 Andrew Davalla Thompson Hine LLP
 Lauren Davides State Street
 Gregory Davis Vanguard
 Kristina Davis Deloitte
 Mary Davis Holt Capital Research and Management Company
 Peter De Proft EFAMA
 Caroline DeCamp Morningstar
 Dawn DeFreitas Vanguard
 Chris Delahunt Citywire
 Bernard Delbecque EFAMA
 Shannon Delise Thrivent Mutual Funds
 Nicholas Deliso Depository Trust & Clearing Corporation
 Paul Delligatti Goodwin Procter LLP
 Michael DeNofrio BNY Mellon
 Jeremy DePalma Wells Fargo Asset Management
 Greg DePaola Wells Fargo
 David Depelteau Thomson Reuters
 Darlene DeRemer Ark Invest Trust
 Robert Deutsch J.P. Morgan
 Sanjeev Dev T. Rowe Price
 Jim Devaney Prudential Investments
 Leonard Di Pietro Tait Weller
 Agnes Diaz Neuberger Berman Investment Advisers LLC
 Gary DiCenzo 360 Funds
 William Dietrich Ariel Investments
 Jerry Dillenburg AMG Funds
 David DiNapoli John Hancock Investments
 Jennifer DiValerio Foreside
 Deborah Djeu Loring Ward
 Austin Doherty John Hancock Investments

Wade Dokken	Integrity Viking Mutual Funds	Kimberly Fazio	Hartford Funds
Joe Dolan	DST	Terry Feld	WisdomTree Asset Management, Inc.
Mary Anne Dolan	Capital Research and Management Company	Adam Feldstein	Strategic Insight
William Dolan	Fidelity Corporate Actions Solutions	Paul Felsch	Edward Jones
Nicholas Donatiello	American Funds	Laura Ferguson	Franklin Templeton Investments
Peter Donatio	Columbia Threadneedle Investments	Savonne Ferguson	T. Rowe Price Associates, Inc.
David Dong	China Universal Asset Management Co. LTD	Terri Fiedler	AIG
Robert Donlen	Vanguard Group	David Fietze	CGM Funds
Andrew Donohue	Principal Global Investors	Randall Fillmore	Aquila Group of Funds
Bob Dorsey	Ultimus Managers Trust	Michael Finck	GlobeTax
Michael Downer	Capital Research and Management Company	Joe Fink	Northern Trust
Kirk Downey	LKCM Funds	Wayne Finnegan	BNP Paribas
Christopher Doyle	EY	William Finnegan	AMG Funds
Matt Doyle	T. Rowe Price Associates, Inc.	Peter Finnerty	PwC
Diane Drake	Mutual Fund Administration, LLC	Heather Fischer	Charles Schwab & Co., Inc.
Michael Driscoll	FIS	Tony Fischer	UMB Fund Services
Greg Drose	UMB Fund Services	Amy Fisher	Touchstone Investments
Peter Drotch	Voya Mutual Funds Group	Gregg Fisher	Gerstein Fisher
Ford Drummond	Allianz Funds	Brian Fitzgerald	Brown Brothers Harriman
Ted Dryden	Thrivent Financial	Michael Fitzgerald	Charles Sterling Group
Amy Duling	Cohen & Steers	Jim Fitzpatrick	NICSA
Scott Duncan	Capital Group	Marty Flanagan	Invesco
John Durso	J.P. Morgan	Julie Flynn	Brown Brothers Harriman
Brian Dvorak	Vanguard Group	Goshka Folda	Strategic Insight
Jan Dymond	The Investment Funds Institute of Canada	Michael Foley	Fidelity Corporate Actions Solutions
Jim Dynan	Multifonds	Basil Fox	Franklin Templeton Investments
Heather Dzielak	T. Rowe Price	Jesse Fox	Charles Schwab & Co., Inc.
Martin Dziura	Investment Managers Series Trust	Wendy Fox	Ariel Investment Trust
Susan Eansor	Thomson Reuters	Joshua Franco	Market Strategies International
Chad Earnst	Prudential Investments	David Franecki	Edelman
William Ebsworth	Wells Fargo Funds	Matthew Franey	Celera Systems
Carlyn Edgar	Atlantic Fund Services	Megan Frank	Allianz Global Investors
Drew Elder	Janus Capital Group	Susan Frasu	BNY Mellon
Paul Ellenbogen	Morningstar	Paul Freeman	Deutsche Funds
Edward Eng	International Financial Data Services	Gary French	J.P. Morgan Exchange Traded Funds / The China Fund
Jeffrey Engelsman	TCW	Gregory Friedman	Fidelity Investments
Brooks Englehardt	USAA	Katherine Fries	U.S. Bancorp Fund Services
James Erceg	T. Rowe Price	Cary Fuchs	Principal Funds Distributor
Timothy Ermi	Olstein Capital Management, L.P.	Markus Fuchs	Swiss Funds and Asset Management Association SFAMA
Jennifer Erskine	EY	Louis Fugazy	SourceMedia
Doug Eu	Allianz Global Investors	Leonard Fuller	Capital Group of the American Funds
Raphael Evanoff	Ignites	Paul Fulmer	USAA
Michae Evans	FUSE Research Network LLC	Candice Gallagher	Federated Investors, Inc.
Nora Everett	Principal	Paul Gallagher	Brown Brothers Harriman
Aric Faber	SalesPage Technologies	Sean Gallagher	BridgePoint
Lawrence Fahey	Eaton Vance	Peter Gallary	Investment Company Institute
Kathee Fajardo	Laser App Software	Lisa Gallegos	Franklin Templeton Investments
Andy Falter	NICSA	Kevin Galvin	MUFG Union Bank, N.A.
Thomas Faust	Eaton Vance		
Micheline Faver	Voya Investment Management		

Satnam Gambhir	Envision Financial Systems, Inc.	Robert Grassi	J.P. Morgan ETFs
Alex Gardner	Diamond Hill Funds	Darryl Grayson	ACR Alpine Capital Research
Leslie Garner	RBC Funds	Keely Grayson-Inman	DST
George Gatch	J.P. Morgan	Steve Graziano	Touchstone Investments
Maria Gattuso	Deloitte	Nicole Greene	DST Systems, Inc.
Dave Gaunt	Strategic Insight	Burt Greenwald	Franklin Templeton Investments
Gina Gavito	Capital Group	Daniel Greifenkamp	Brown Brothers Harriman
Robert Geiger	Vanguard	John Griffin	PwC
Carson Geiss	Pacific Life	Mick Grunewald	Ultimus Fund Solutions
Alexander Gelski	UBS	William Hackett	Matthews International Capital Management, LLC
Charles Geremia	National Financial Services	Elizabeth Hager	Lincoln Variable Insurance Products Trust
John Gernon	Morgan Stanley	Neil Haggerty	MLex News
Jon Gezotis	Citi	Ghassan Hakim	Franklin Templeton Investments
James Giallanza	Cohen & Steers	James Hall	State Street Bank & Trust Company
Danny Gilbert	Broyhill Assets	Susan Hall	Pioneer Investments
Martin Gilbert	Aberdeen Asset Management	David Halligan	SalesFocus Solutions
Peter Gilbert	Blackstone Alternative Investment Funds	Theresa Hamacher	Calamos
Linda Giuffre	Bridgeway Capital Management	Lisa Hamman	Independent Directors Council
Bethanie Glawson	Mariner Holdings	Mark Hancock	PNC Funds
Kevin Gleason	Voya Funds	Marco Hanig	AQR Capital Management
Hannah Glover	Ignites	Sean Hanna	MFWire
Leonard Glynn	Putnam Investments	James Hannigan	Blackstone
Renee Godin	Goldman Sachs & Co.	Douglas Hanson	Charles Schwab & Co., Inc.
Jennifer Goerlich	BNY Mellon	Janet Hanson	Deloitte
Anne Goggin	Pax World Funds	Daniel Hanwacker	City National Rochdale Funds
Tanya Goins	Thompson Hine LLP	Francis Harmon	Driehaus Mutual Funds
Tim Gokey	Broadridge Financial Solutions	Brian Harris	State Street Global Advisors
Lindsay Gold	Baillie Gifford Overseas	Gary Harris	ALPS Inc
Joel Goldberg	WisdomTree	Sidney Harris	RidgeWorth Funds
Lena Goldberg	BlackRock	Karl Hartmann	CSOP ETF Trust
Jon Goldstein	Putnam Investments	Keith Hartstein	Prudential Retail Funds
Katy Golvala	MFWire	Steven Hartstein	Brighthouse Funds
Beverly Goodman	Barron's Magazine	Shannon Hartwell	M Financial Group
Amy Gordin	Franklin Templeton Investments	Verne't Hatcher	American Funds
Amy Gordon	Boston Financial Data Services	Karl Hausafus	Saturna Capital
Peter Gordon	Wells Fargo Funds	Richard Hauser	Thrivent Mutual Funds
Thomas Gordon	J.P. Morgan	William Hawkins	Columbia Funds
George Gorman	Eaton Vance Funds	Yuka Hayashi	Wall Street Journal
Kathleen Gorman	RBC Funds	Sharra Haynes	Davis Selected Advisers
Richard Gorman	Oakmark Funds	Karen Heath-Wade	Nationwide Financial
Scott Gormley	Franklin Templeton Investments	Anne Hebard	Boston Financial Data Services
Cory Gossard	ALPS Fund Services	Jodi Hedberg	Manning & Napier Fund, Inc
Christopher Gouveia	Fidelity Investments	Thomas Hefty	Artisan Partners Funds
Diana Gouzeas	Northern Trust	Jason Heinhorst	FUSE Research Network LLC
Rick Grabish	OppenheimerFunds	Helene Heman	NRS, A Division of Accuity Inc.
Stephen Graddy	American Beacon Advisors	Bethany Hendricks	Franklin Templeton Investments
Mike Graham	Capital Group	Tom Henk	PwC
Christine Grande	PGIM Investments	Neil Hennessy	Hennessy Funds
Thomas Grande	GlobeTax	Ryan Henrich	Fifth Third Bank
Kenneth Grant	Unified Series Trust	Christian Henriksen	Norwegian Fund and Asset Management Association

Patrick Henry	Deloitte	Dwight Jacobsen	Lazard Asset Management
Ralf Hensel	The International Investment Funds Association	Ankush Jain	Morgan Stanley
Cecilia Herbert	iShares and Forward Funds	Mancini Jane	State Street
Pamela Hernandez	SEI	Hans Janssen Daalen	Dutch Fund and Asset Management Association
Donald Herrema	TD Bank USA Funds	Scott Jardine	First Trust Portfolios L.P.
Diana Herrmann	Aquila Investment Management LLC	Julie Jason	Jackson, Grant Investment Advisers, Inc.
Alan Herzog	Bridge Builder Trust	Julie Jason	King Features Syndicate
Tom Hicks	Edward Jones	Mollie Jensen	Russell Investments
Stephanie Higby	USAA	Steven Jensen	U.S. Bancorp Fund Services
Jeff Hilk	Diligent Corporation	Adeel Jivraj	EY
Leo Hill	Transamerica Funds	John Johmann	BNP Paribas
James Hillman	Value Line Funds	Eric Johnson	PIMCO
James Hinkley	Macquarie Investment Management	Greg Johnson	Franklin Templeton Investments
Brian Hirsch	Nationwide Funds	Jason Johnson	Deloitte
Fritz Hirsch	Principal Mutual Funds	Judy Johnson	Wells Fargo mutual funds
Spencer Hoffman	Lovell Minnick Partners	Rick Johnson	Boston Financial Data Services
Michael Hogan	Charles Schwab Investment Management	Zachary Jolly	Charles Schwab & Co., Inc.
Craig Hollis	Boston Financial Data Services	Andrew Jones	Citywire
Thomas Holly	PwC	Leonade Jones	American Funds
John Honis	Highland Capital Funds	Lisa Jones	Pioneer Investment Management
Clark Hooper	Capital Research and Management Company	Thom Jones	Columbia Threadneedle Investments
Kelsey Hooven	Macquarie Investment Management	Eugene Jooste	Association for Savings and Investment - SA
Mark Hornbrook	Deloitte	James Jordan	First Eagle Funds
Nick Horvath	DST	Marc Joseph	Thrivent Funds
Cynthia Hostetler	Invesco Funds	Minnie Joung	State Street
Richard Howell	LKCM Funds	James Kaiser	BBD, LLP
Vicky Huang	Citywire	Armin Kammel	Austrian Association of Investment Fund Management Companies
Mark Hubbard	FundSERV Inc.	Tim Kan	Envision Financial Systems, Inc.
Jason Hubersberger	Edward Jones	Eric Kane	Gemini Fund Services, LLC
Sandy Hughes	UMB Fund Services	Reshma Kapadia	Barron's Magazine
Benjamin Huneke	Morgan Stanley Wealth Management	Stephen Kaszynski	Homestead Funds, Inc.
Yie-Hsin Hung	New York Life Investments	Carl Katerndahl	Nuveen Investments
Patrick Hurley	OppenheimerFunds	Linda Kaufmann	Tait Weller
Jeremy Hurwitz	Accenture	John Kavanaugh	MFS Funds
Montieh Illingworth	Montieth & Company	James Kearney	Vanguard Group
Jonathan Illuzzi	Fidelity Investments	Robert Kearney	Milestone Group
Jeff Immelt	GE	Lesley Keefe	EY
Vincent Ingham	EFAMA	Joseph Keenan	BNY Mellon
James Interrante	John Hancock Financial Services, Inc.	Michael Keenan	MFS Investment Management
Domenic Ionadi	Confluence	Jay Keeshan	Management Practice Inc.
Bridget Ireland	FIS	Paul Keith	Wolters Kluwer Financial
Jonathan Isaac	NextShares Solutions LLC	Robert Keith	AB
Michael Isaac	Stadion Funds	Burton Keller	Delta Data
Andrew Iseman	Scout Investments, Inc.	Chris Keller	Harris Associates / Oakmark Funds
Corey Issing	Neuberger Berman	Brian Kelley	Putnam Investments
Rob Ivanoff	ETF Business Review	Walter Kelly	Nuveen Investments
Mary Lou Ivey	World Funds Trust	Beth Kennedy	AIG
Hillary Jackson	Fund Board Views	Geoffrey Kenyon	Dechert LLP
William Jackson	Computershare Fund Services	Susan Kerley	Mainstay Funds and Legg Mason Funds
Josh Jacobs	J.P. Morgan		

Robert Kern	U.S. Bancorp Fund Services	Thomas Lemke	J.P. Morgan ETF Funds
Brian Kerrane	Neuberger Berman	Russell Lemley	Capital Research and Management Company
Mike Kerrigan	Accenture	Gary Lemon	Lincoln Variable Insurance Products Trust
Doug Kidd	Invesco	April Lentz	Charles Schwab & Co., Inc.
Brian Kilcullen	Kilcullen & Company	Destiny Lentz	Broadridge Financial Solutions
Kelly Kilroy	DTCC	Bruce Leppa	Lieff Cabraser Heimann & Bernstein LLP
Julia Kim	Korea Financial Investment Association	Robert Leveille	Invesco Funds
James Kimmel	Olstein Capital Management, L.P.	Rochelle Levy	J.P. Morgan
Keith Kirk	DoubleLine	Brian Lewbart	T. Rowe Price
Jane Kirkland	State Street	Mary Kay Lewis	Vanguard
Phil Kirstein	AllianceBernstein	Robert Lewis	Broadridge Financial Solutions
David Kittredge	T. Rowe Price	Wen Li	China Universal Asset Management Co. LTD
Jeffrey Klepacki	Aberdeen Asset Management	Xing Li	Asset Management Association of China
Jennifer Knapp	SEI	Becca Lin	Securities Investment Trust & Consulting Association of the R.O.C.
Timothy Knierim	Morgan Stanley	Tsai-Jung Lin	Securities Investment Trust and Consulting Association
Thomas Knipper	Investment Managers Series Trust	Dawn Lindberg	Vanguard
Marie Knowles	Fidelity Fixed Income & Asset Allocation Funds	Hopeton Lindo	Advise Technologies
Frank Knox	John Hancock Financial Services, Inc.	Randy Linscott	M3Sixty
Ted Knutson	Financial Advisor Magazine	Jonathan Lipkin	The Investment Association
Moiz Kohari	State Street Bank & Trust Company	Jay Lipman	BNY Mellon
Walter Koller	Societe Generale Securities Services	Jacqueline Lippy	T. Rowe Price Associates, Inc.
Adam Kornegay	Ultimus Fund Solutions	Mark Lipson	ML2 Advisors, LLC
Merrilyn Kosier	Ariel Investments	Len Lipton	GlobeTax
Cleo Kotis	Tocqueville Trust	Andrea Lisher	J.P. Morgan
Khushboo Koutu	DST	Susan Livingston	BBH Trust
Lee Kowarski	DST Systems, Inc.	Will Livingston	Axioma
George Kozakis	Broadridge Financial Solutions	Claudia Lobenthal	AXA Equitable
Paul Kraft	Deloitte	John Locksley	ICE Data Services
Pamela Krill	Godfrey & Kahn, S.C.	Kimberly Loesch	Vanguard
Dilip Krishna	Deloitte	David Loevner	Harding Loevner Funds, Inc.
Todd Kuehl	Legg Mason	Rachel Loko	U.S. Securities and Exchange Commission
Michael Kuritzkes	Value Line Funds	Brian Long	Fidelity Investments
Alexander Kymn	Wells Fargo	Bruce Long	Baillie Gifford Overseas
Doug Laird	Janus Capital Group	David Long	Edward Jones Investments
David Lamb	Nuveen Securities	Steven Longley	Financial Recovery Technologies
Amy Lancellotta	Independent Directors Council	Heather Lord	Capital Group
Adam Langley	Angel Oak Capital Advisors	Dingfang Lou	Asset Management Association of China
Jeanne LaPorta	State Street Global Advisors	Jim Love	RidgeWorth Investments
Pat Lardner	Irish Funds	Sandra Lu	Asset Management Association of China
Vercie Lark	DST Systems, Inc.	Jill Lubold	Macquarie Investment Management
David Larrabee	Tributary Funds	Ryan Lund	Columbia Threadneedle Investments
Albert Laskaj	Cohen & Steers	Sean Lynch	BNY Mellon
Eric Lauterbach	Vanguard	Carol Lynde	Bridgehouse Asset Managers
Colleen Lavery	Eaton Vance	Brenda Lyons	State Street Corporation
Paul Lawler	First Eagle Funds	Shawn Lytle	Macquarie Investment Management
Mauree Leary-Jago	Edward Jones Money Market Fund	Joseph Maccone	AMG Funds
Polly LeBarron	National Quality Review	Laurene MacElwee	Pacific Life
Hwantae Lee	Korea Financial Investmnet Association	Catherine MacGregor	Charles Schwab & Co., Inc.
Mark Lee	Parnassus Investments		
Richard Lee	Allianz Global Investors		

Matthew Mackay	J.P. Morgan	Joe McDermott	Aviva Investors Americas
James MacLeod	Allianz Funds	Amy McDonald	Fidelity Investments
Mike MacNaught	MFS Investment Management	John McDonough	OppenheimerFunds
Brian MacPhee	John Hancock Investments	Susan McGee	U.S. Global Investors
Lawrence Maffia	J.P. Morgan ETF Trust	Jeff McGuire	Cerulli Associates
Stephen Maginn	AI	Susan McIntosh	Federal Reserve Board
Jaime Magyera	BlackRock	Sandy McKenna	BNY Mellon
Kristi Maher	First Trust Portfolios L.P.	James McKinney	Saturna Capital
Carsten Mahler	FundConnect	Peter McKown	American Growth Fund
Stephanie Mahon	Parnassus Investments	Trevor McLeod	T. Rowe Price
James Mahoney	Tait Weller	William McManus	BNY Mellon
Audra Mai	Charles Schwab Investment Management	F. William McNabb	Vanguard
Marc Mallett	SimCorp	James McNamara	Goldman Sachs & Co.
Kyle Mallot	DST Systems, Inc.	Michael McNeill	Boston Financial Data Services
Gerald Malone	Aberdeen Funds	Bill McVay	AdvisorShares
Michael Maltby	Eagle Investment Systems	Marcus Mecklenburg	BVI
Mark Manassee	ICON Funds	Brian Melter	Boston Financial Data Services
Chris Mancini	Workiva	Donald Mendelsohn	Thompson Hine LLP
Maria Mann	DST	Adri Messerschmidt	Association for Savings and Investment - SA
Barbara March	BridgePoint	Terry Metzger	Boston Financial Data Services
Michael Marcigliano	Broadridge Financial Solutions	Carleen Michalski	Delaware Investments
Scott Marcus	Delta Data	Stefano Michelagnoli	HSBC Global Asset Management
Frank Maresca	AST Fund Solutions, LLC	Amy Miller	U.S. Securities and Exchange Commission
HJ Markley	Goldman Sachs Asset Management	Chip Miller	Investment Managers Series Trust
Lucinda Marrs	Wellington Management	Diane Miller	Christian Brothers Investment Services, Inc.
Jennifer Martin	Charles Schwab & Co., Inc.	Heather Miner	Goldman Sachs Asset Management
Paul Martin	Morgan Stanley Investment Management	Thomas Mistele	Dodge & Cox
Elisabeth Martinetz	Tait Weller	Chris Mitchell	NextShares Solutions LLC
Laura Martinez	PwC	Steven Miyao	DST
Michael Martins	Fred Alger & Co.	Jim Mock	Boston Financial Data Services
Jeff Masom	Legg Mason	Eruch Mody	Brown Brothers Harriman
Dennis Mason	Forum Funds	Asif Mohamed	J.P. Morgan
Vinnett Mason	T. Rowe Price	Leigh Moiola	Thornburg Investment Management
W. Edward Massey	Lieff Cabraser Heimann & Bernstein LLP	Emile Molineaux	Vertical Capital Income Fund
Mike Mastroianni	J.P. Morgan	Susan Montgomery	J.P. Morgan
Robert Mathisen	BNY Mellon	Gwen Moody	T. Rowe Price
Jeffrey Mattson	John Hancock Investments	Theresa Moore	MUFG Union Bank, N.A.
PJ Matulka	DST	Javier Morales	USAA Investment Management Company
Joseph Mauriello	Fidelity Equity & High Income Funds	Brian Moran	AMG Funds
Ruth Mayr	U.S. Bancorp Asset Management, Inc.	Brian Moran	Sterling Capital Management LLC
Jocelyn McBride	Computershare Fund Services	Tom Morelli	T. Rowe Price
Michael McBrinn	Wolters Kluwer Financial	Nancy Morris	Wellington Management Company LLP
Karen McCafferty	John Hancock Funds	Sandra Morris	J.P. Morgan
Peggy McCaffrey	Cohen & Company	Bailey Morris-Eck	Capital Research and Management Company
Stanley McChrystal	The McChrystal Group	Laurence Morse	Oakmark Funds
Karan McClimans	T. Rowe Price	Rob Mortensen	UMB Fund Services
Rosemary McCollin	J.P. Morgan	Michele Mosca	Manning & Napier Fund, Inc
Julie McConnell	Diamond Hill Capital Management	Derrick Mosley	Franklin Templeton Investments
Traci McCormack	Fidelity Investments	Joel Motley	OppenheimerFunds
Devin McCune	Broadridge Financial Solutions	Lisa Mouglin	ALPS Inc

Priscilla Moyer	Franklin Templeton Investments	Henry Orvin	Pioneer Investments
Todd Moyer	Confluence	Don Osmanski	New York Life Investments
Peter Muldoon	Multifonds	Alberto Osorio Morales	The Mexico Fund Inc.
Bob Mulhall	EY	Mark Osterheld	HVIT Funds
Andi Mullins	Valued Advisors Trust	Andrew Owen	Wells Fargo
John Murphy	Legg Mason Global Asset Management	David Owen	Allianz Global Investors
Karym Murphy	Hengtian Services LLC	Joanne Pace	OppenheimerFunds
Peter Murphy	Financial Recovery Technologies	Sharon Pacheco	Pacific Life
Jason Murray	Edward Jones	Sachin Padmawar	Vanguard
David Musto	Great-West Investments	Steven Paggioli	AMG Funds
Avi Nachmany	Strategic Insight	Joseph Palombo	RSM US LLP
Fred Naddaff	FIS	Thomas Pandick	Tocqueville Trust
Gariel Nahoum	Neuberger Berman	Erika Panyard	US Bancorp Fund Services
Michael Nanosky	PNC Funds/PNC Bank	Joseph Paolo	AXA Equitable
Gene Needles	American Beacon Advisors	Irene Papadoulis	Dreyfus Transfer Inc
Erin Nelson	ALPS Advisors, Inc.	Andy Pappert	Alpine Woods Capital Investors
Mark Nerud	Jackson National Asset Management LLC	Steve Papulak	SEI
Joseph Neuberger	U.S. Bancorp Fund Services	Ashi Parikh	RidgeWorth Funds
Russell Newman	Rothschild Asset Management	Ron Parker	PIMCO Funds
Ryan Newman	ReFlow Services	Stuart Parker	PGIM Investments
Nick Nichols	DST Systems, Inc.	Kim Pascalau	OFI Global
Paul Nicklen	Wildlife Photographer	Mark Pawlyshyn	U.S. Bancorp Fund Services
Greg Niland	Capital Group	Tina Payne	Cohen & Steers
Catherine Nitschke	J.P. Morgan	Stephen Penders	Command Financial
Jackie Noblett	Ignites	Timothy Penny	Wells Fargo Funds
Jim Nolan	Citi	George Pereira	Charles Schwab Investment Management
Richard Norman	Cohen & Steers	Scott Perkins	Computershare Fund Services
Ben Northover	Money-Media	James Perna	Homestead Funds, Inc.
Barbara Nugent	BMT Funds / Metlife Funds	Gene Pesci	Fidelity Investments
Michael Nugent	Morgan Stanley Funds	Lance Peterson	Scout Investments
Jay Nusblatt	Donnelley Financial Solutions	Paul Pfeiffer	T. Rowe Price
Amadi Nze	Barrow, Hanley, Mewhinney & Strauss, LLC	Chris Pheiffer	Allianz Investment Management LLC
Drew O'Hearn	Cerulli Associates	Kevin Phelan	BNY Mellon Funds Trust
Michael Oakes	Morningstar	Jeffrey Phillips	Donnelley Financial Solutions
Kelli O'Brien	J.P. Morgan	Justine Phoenix	Fidelity Investments
Paul O'Brien	Aquila Group of Funds	Greg Piaseckyj	SalesPage
Patrick O'Connor	Cozen O'Connor	Mary Ann Picciotto	OppenheimerFunds
Kelly O'Donnell	Pioneer Investments	Chris Pini	Money-Media
Glenn O'Flaherty	Aquila Group of Funds	Elizabeth Piper-Bach	AdvisorShares
Debra Ohstrom	Allianz Global Investors	Cheryl Pipia	T. Rowe Price
Yoshio Okubo	Japan Investment Trust Association (JITA)	Matthew Pisanelli	T. Rowe Price
Daniel O'Lear	Franklin Templeton Investments	Albert Pisano	First Eagle Funds
Erik Olsen	ACA Compliance Group	Jorge Plascencia	Laser App Software
Erik Olsen	Northern Trust	Alex Plumb	Broadridge Financial Solutions
Susan Olson	ICI Global	Tito Pombra	Matthews Asia
Susan Olson	Natixis Global Asset Management	Ori Porat	Fiducia Optime
Paul O'Neil	Insigma HengTian Software Ltd	Brian Porter	Charles Sterling Group
Arlen Oransky	Money Management Institute	Mindy Posoff	Oakmark Funds
Mike Oroszi	T. Rowe Price	Jason Post	Highland Capital Management, LP
Robert Ortense	Broadridge Financial Solutions	Sheryl Pressler	Voya Funds

Katherine Primas	Dodge & Cox	Christopher Rosenthal	BNY Mellon
Dean Privetera	Toppan Vite	Bradley Ross	Highland Capital Management, LP
John Prouty	Northern Trust Company	Frank Ross	Cohen & Steers
Andy Provencher	American Century Investments	James Ross	State Street Global Advisors
Domenick Pugliese	Schiff Hardin LLP	Christyn Rossman	Vanguard
Dan Puopolo	NextShares Solutions LLC	Sarah Rothenbuhler	Saturna Capital
Mary Quam	Ameriprise Financial	Brian Rotter	ICON Advisers
Lou Quattrucci	Accenture	Stephen Roussin	Eagle Funds
Maureen Quill	UMB Fund Services	Kristi Rowsell	Harris Associates
Jo Ann Quinif	Weitz Investment Management, Inc.	Paul Roye	Capital Research and Management Company
Mark Radcliffe	Sharespost 100	Rock Rudovic	Axioma
Robert Rafferty	Accenture	Charles Ruffel	Schwab
Greg Ramirez	Artisan Partners	Tate Rupprecht	PGIM Investments
Andrew Ramonas	Bloomberg BNA	Tamara Sablic	SS&C GlobeOp
Walter Randall	William Blair	Adam Sachs	Brookfield Investment Management Inc.
Krishna Rangarajan	Donnelley Financial Solutions	Debasis Sahu	PwC
Thomas Rath	Lincoln Variable Insurance Products Trust	Pamela Salaway	Lincoln Variable Insurance Products Trust
Karen Rau	Fiduciary Counselling, Inc.	Derek Saliba	Manulife Investments
Sue Raymondi	ICE Data Services	Michael Saliba	Baillie Gifford
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Matt Reed	Strategic Insight	Alexander Samuelson	Neuberger Berman
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Allan Reich	Oakmark Funds	Miriam Sanchez	MARS Sales Focus Solutions
Devon Reichelt	Thomson Reuters	Jill Santandreu	SalesFocus Solutions
Alan Reid	Reid Partners	Mark Santero	BNY Mellon
Brian Reilly	NextShares Solutions LLC	Joseph Santoro	Deutsche Bank
Teresa Ressel	Invesco Funds	Michael Sapir	ProShares
Christopher Rhodes	Edward Jones	George Sapp	U.S. Bancorp Fund Services
David Ribbens	Northwestern Mutual Series Fund	Thomas Sarkany	Value Line Funds
Carl Riccobono	Fidelity Investments	Michael Saunders	Brown Brothers Harriman
Meredith Rice	Market Strategies International	Elizabeth Savino	PwC
Chris Riggio	Strategic Insight	Michael Saylor	T. Rowe Price
Jeff Ringdahl	American Beacon Advisors	Robert Scales	Robert P Scales, LLC
Heikki Rinne	Wasatch Funds	Elizabeth Scalf	US Bancorp Fund Services
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Charles Rizzo	John Hancock Investments	Peter Scheve	Accenture
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Kenneth Robins	Fidelity Investments	Mark Schikowski	Cohen & Company
Anne Robinson	Vanguard	Clifford Schireson	Brandes Investment Partners, LP
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Noah Rogers	Donnelley Financial Solutions	Kyle Schmiegel	Operational Services
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William Rosensweig	Brown Brothers Harriman	Carrie Schoffman	ICON Funds

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Jeff Schwantz	Morningstar	Conor Smyth	Accudelta
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Lisa Shalett	Morgan Stanley Wealth Management	Kenneth Stella	Lincoln Variable Insurance Products Trust
Gwen Shaneyfelt	Franklin Templeton Investments	Kathy Stelter	Thrivent Funds
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Sonia Shields	J.P. Morgan	Allen Strain	Scout Funds
Julia Short	RidgeWorth Funds	Jeannine Strandjord	American Century Investments
John Siciliano	PwC	Jeffrey Strange	Strategic Insight
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Jonas Siegel	Trust for Professional Managers	Frank Strauss	Accenture
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Linda Singer	Angel Oak Capital Advisors	Christopher Sullivan	Voya Mutual Funds Group
Jackie Sinker	Calamos	George Sullivan	SEI Funds
John Skidmore	Parnassus Investments	Peter Sundman	Diamond Hill Funds
Erik Skulte	eSecLending	Giles Swan	ICI Global
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Andrene Smith	Prudential	Brian Swanson	MUFG Union Bank, N.A.
Brad Smith	American Funds	Catlin Sweeney	Money-Media
Chris Smith	Affiliated Managers Group, Inc.	Matt Sweeney	MFS Investment Management
Christina Smith	Thrivent Financial	Brad Swenson	ALPS Fund Services
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Scott Smith	Cerulli Associates	Timothy Taggart	American Growth Fund

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 Ellen Terry The New America High Income Fund, Inc.
 Joan Tesla Confluence
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 Kerry Thiede Northern Trust
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 Lydia Thomas American Funds
 Shundrawn Thomas Northern Trust Asset Management
 William Thomas ETF Securites
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 Colin Tigh SimCorp
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 Frank Wheeler Matthews Asia
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Aaron Wong	SalesFocus Solutions
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Mike Wood	Charles Schwab & Co., Inc.
Michael Woods	Rothschild Asset Management
Raymond Woolson	DoubleLine Funds-Advisors Series Trust
Louis Wright	KNEIP
Rich Wuchte	Vintage, a Toppan Vite Company
Ling Xiao	Fidelity Investments
Qiumei Yang	ICI Global
Stephen Yates	American Century Investments
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Lior Yogev	Multifonds
Julien Yoo	Goldman Sachs Asset Management
Gary Young	Diamond Hill Funds
John Zader	IMST
Ann Zeiler	Northern Trust
Jon Zeschin	Matthews Asia Funds
Xiaoi Zhang	Asset Management Association of China
Gary Zielinski	Fidelity Investments