

# 2018 GMM

## GENERAL MEMBERSHIP MEETING

May 22–24 | Washington Hilton Hotel | Washington, DC

60  
YEARS

## Attendee List by Name

Brad Adams	Tortoise Capital Advisors, LLC	Michael Baker	J.P. Morgan Asset Management
Vijay C Advani	Nuveen	Mary Baker-Balady	J.P. Morgan
Ravi Akhoury	Putnam funds	Mark Barnard	AXA Equitable Funds
Jorge Alamillo	The Mexico Fund Inc	Kent Barnes	Direxion Funds
Alyssa Albertelli	State Street Global Advisors	Janice Barnwell	DTCC
Stephen Alderman	Brighthouse Funds	Kathleen Barr	William Blair Funds
Mike Alger		Lance Barrett	Vanguard
Carl Algermissen	OppenheimerFunds	Donna Barrette	Professionally Managed Portfolios
Julie Allecta	Salient Funds; Litman Gregory Masters Funds	Matthew Barry	Investment Company Institute
		Debbie Bartel	Franklin Templeton Investments
John Alshefski	SEI	Gregory Barton	WisdomTree Asset Management
Eileen Ambrose	Kiplinger's Personal Finance Magazine	Steven Bass	Investment Company Institute
Chris Ambruso	ICON Advisers, Inc.	Stuart Bateman	Franklin Templeton Investments
Eun (Jenny) An	The Vanguard Group, Inc.	T. Neil Bathon	Vertical Capital Income Fund
Kyle Andersen	Edward Jones	John Baumgardner	Sullivan & Cromwell LLP
Erica Andersen	Workiva	Laura Bautista	Vanguard
Neil Anderson	MFWire	Danielle Beaulieu	Investment Company Institute
Audrey Anderson	Investment Company Institute	Theodore Beck	Driehaus Mutual Fund
Jon Anderson	SS&C Technologies	Matthew Beck	Investment Company Institute
Brandon Anderson	DST	Erik Beck	
Reagan Anderson	Capital Group	Antoinette Behan	Toppan Vintage
Charles Andrews	Washington Mutual Investors Fund	Chris Bellamy	Cohen & Company
Michael Andrews	DST Research, Analytics, and Consulting LLC	Scott Benjamin	PGIM Investments
Anthony Anella	SEI	Barry Benjamin	PwC
Rochelle Antoniewicz	Investment Company Institute	Michelle Benner	UMB
Ronald Anzivino	FilePoint	Thomas Bennett	AIG Fund Services
Daniel April	Thompson Hickey, P.A.	Alyssa Bentz	U.S. Bancorp Asset Management, Inc.
Lesley-Anne Archibald	Baillie Gifford	Stephanie Beran	Legg Mason
Dana Armour	U.S. Bancorp Fund Services, LLC	Glen Bergert	ICON Funds
Jane Armstrong	Artisan Partners	Patrice Bergé-Vincent	ICI Global
Scott Arndt	Broadridge	Lana Bergstein	Dimensional Fund Advisors
Jeanne Arnold	Investment Company Institute	Edward Bernard	T. Rowe Price Group, Inc.
Marie Aro	Aquila Distributors LLC	Todd Bernhardt	Investment Company Institute
James Ash	Gemini Fund Services, LLC	Stacy Bernstein	American Century Investments
John Ashley	Hartford Funds	Michael Bessel	Guardian Life
Dennis Asselta	Financial Times	Sarah Bessin	Investment Company Institute
Whitfield Athey	Delta Data	Rupal Bhansali	Ariel Investments
Don Auerbach	Investment Company Institute	Ramesh Bhargava	Investment Company Institute
Joy Ausili	Investment Managers Series Trust	Nitin Bhat	Morgan Stanley Investment Management
Preslava Avramova	Investment Company Institute	Sue Bhogal	T. Rowe Price

Karin Billias	DTCC	Garrett Burke	IHS Markit
Brooke Billick	Artisan Partners Funds	Allana Burke	Strategic Insight
Angela Bisagna	Computershare Fund Services	Walter Burkley	Capital Research and Management Company
Laura Bissell	Okapi Partners	Robert Burns	Charles Schwab Family of Funds
Brett Black	BMO Funds	Marty Burns	Investment Company Institute
Jennifer Block	Principal Funds	David Burns	Prudential
Andy Blocker	Invesco	Ed Bush	American Growth Fund
Pete Bockelman	Investment Company Institute	Hugh Butler	Permanent Portfolio Family of Funds
Joe Boerio	Franklin Templeton Investments	Carla Byer	AXA
John Boese	Impax Asset Management	Stephen Byers	DBX ETF Trust
Michael Bogdan	The Investment Company Institute	Maria Cabral	The Northern Trust
Gregg Boland	Harbor Funds	Paul Cahill	BNP Paribas
Tracy Bollin	Principal Financial Group	Matt Calabro	Ascendant Compliance Management
Kevin Bopp	New York Life Investment Management LLC	Peter Callahan	AB Global
Bruce Bossio	Charles Schwab	Paul Camarata	Investment Company Institute
Donald Boteler	Parnassus Funds / FAM Funds	Kristen Cammarata	Aberdeen Standard Investments
Cindi Boudreau	Computershare Fund Services	Steven Camp	Vestmark
Tonya Bouley	Investment Company Institute	Karen Campanale	Confluence Technologies
Paul Bourque	The Investment Funds Institute of Canada	Samuel Campbell	FUSE Research Network
Dennis Bowden	Strategic Insight	Clarke Camper	Capital Group
Stuart Bowers	DST Brokerage Solutions	Lynne Cannon	Sterling Capital Funds
Nora Bowman	eSecLending	Rebecca Cantrell	Capital Group
Jay Boyd	Invesco	David Capalbo	Global Atlantic Investment Advisors
Bridget Boyd	Investment Company Institute	Salvatore Capizzi	Dunham & Associates
Chris Boyland	Investment Company Institute	Marissa Capodanno	Fund Intelligence
Jeff Boyle	MUFG Union Bank, N.A.	Annette Capretta	Independent Directors Council
Cornelia Boyle	Thompson IM Funds	Greg Caravella	U.S. Bancorp Fund Services, LLC
Mark Bradley	Amundi Pioneer Asset Management	Cosmo Carelli	Investment Company Institute
Peter Brady	Investment Company Institute	Jeff Carlin	Nuveen
Ian Bragg	The Investment Funds Institute of Canada	James Carman	The Investment Funds Institute of Canada (IFIC)
Michael Brascetta	Citi	David Carson	Ultimus Fund Solutions
Jamie Braverman	Invesco	Jane Carten	Saturna Capital
Darlene Breau	MFS Investment Management	Kellen Carter	ARK Investment Management LLC
Joe Bree	U.S. Bancorp Fund Services	Andy Carthy	Donnelley Financial Solutions
John Breitweg	J.P. Morgan	Gale Caruso	Matthews Asia Funds and Pacific Life Funds
Ronan Brennan	Compliance Solutions Strategies	Mark Carver	UBS Asset Management
Linda Brenner	Investment Company Institute	Timothy Carver	GQG Partners
Brian Brett	American Beacon Advisors	Gary Casagrande	Confluence
Miriam Bridges	Investment Company Institute	Sarah Casey	Citi
Lisa Bright	Investment Company Institute	Henry Cashen	Blank Rome
Michael Brodsky	Deloitte Advisory	Frances L. Cashman	Legg Mason
Jayson Bronchetti	Lincoln Financial Group	Kathryn Cassidy	Goldman Sachs Mutual Funds
Adam Broun	Kensho	Maria Castellon	Investment Company Institute
Debbie Brown	Broadridge	Mike Castino	U.S. Bancorp Fund Services
Laura Brown	Investment Company Institute	Paul G. Cellupica	SEC, Division of Investment Management
Christy Brown	Northwestern Mutual	Dolie Chacko Sarbanis	State Street Corporation
Angie Brownie	Investment Company Institute	Wayne Chai	Charles Schwab
Michael Buberl	T. Rowe Price	Matt Chambers	Horizon Funds
Toni Bugni	Northern Trust	Muy Chan	Brown Brothers Harriman
Scott Buitekant	J.P. Morgan	Marie Chandoha	Charles Schwab Investment Management
Jim Bumpus	Columbia Threadneedle Investments	Lu Chang	Angel Oak Capital Advisors
Juan Carlos Bungay	Ignites	Laura Chasney	T. Rowe Price Group
Thomas Bunn	American Century Funds	Scott Chelton	DST
Barbara Burdett	T. Rowe Price		
Vera Burdt	DST Systems		

Brandon Chen	Investment Company Institute	Peter Crane	Crane Data
Ping Jen Chen	Securities and Futures Bureau, Financial Supervisory Commission	Erika Craven	Broadridge
David Chernin	Diligent Corporation	Matthew Cressy	Compliance Solutions Strategies
Jennifer Cheskiewicz	Hennessy Funds	Jeff Crisci	Diligent Corporation
Lou Childs	Delta Data	Patricia Crockan	DST Systems
Howard Chin	Baillie Gifford	Bruce Crockett	Invesco Funds
Elena Chism	Investment Company Institute	Jim Cronin	T. Rowe Price
Jennifer Choi	ICI Global	Christopher Crossan	Dimensional Fund Advisors
Jeff Chong	Investment Company Institute	Marcela Crossman	SS&C GlobeOp
David Chow	MainStay Funds and VanEck Vectors ETF Trust	Tim Crowley	Bloomberg LP
Michael Chun	J.P.Morgan	Allison Crowley	Investment Company Institute
Ludmila Chwazik	Water Island Capital	Michael Cuggino	Pacific Heights Asset Management, LLC
Todd Cipperman	Cipperman Compliance Services	Dan Cummings	TIAA-CREF Funds
Laurie Cipriano	Investment Company Institute	Chris Cummings	The Investment Association
Beth Civerolo	Homestead Funds	Vanessa Cuzzo	Brown Brothers Harriman
James Clark	Putnam Investments	Lisa Curcio	The Royce Funds
Jason Clark	SEI	Paul Curley	Strategic Insight
Stephen Clarke	NextShares Solutions LLC	Patrick Curtin	Citi
Michael Clifton	Pacific Life Fund Advisors LLC	Stephanie Curtis	Investment Company Institute
Nancy Cloran	SEI	Vince Curttright	Cohen & Company
Steve Cobb	Lincoln Variable Insurance Products Trust	Stephen Cutka	American Funds
Melanie Cohen	Investment Company Institute	Daniel Cwenaar	Broadridge
Howard Cohen	Davis Selected Advisers, L.P.	Catherine Dalton	ICI Mutual
Kerry Cole	Investment Company Institute	Rita Dam	Mutual Fund Administration, LLC
Frank Colella	BNP Paribas	Diana Daniels	Goldman Sachs Mutual Funds
Sally Coleman	Investment Company Institute	Chris Danielson	Ameriprise Financial
Stacey Coleman	Franklin Templeton Investments	Magen Dargon	Investment Company Institute
Maureen Colligan	ACA Compliance Group	Robert Darmanin	Citibank NA
Michael Collins	Broadridge Financial Solutions	Nickolaus Darsch	ALPS Fund Services
Sean Collins	Investment Company Institute	Matthew Daversa	Investment Company Institute
Alan Colodner		Wendy David	Diligent Corporation
James Compton	Ariel Investment Trust	Lauren Davides	State Street
Janine Comstock	MFS Investments	Brian Davies	MUFG Union Bank, N.A.
Susan Condelli	Fidelity Corporate Actions Solutions	Chuck Davis	DST Systems
Patricia Conley	Investment Company Institute	Meghan Day	Diligent Corporation
Elizabeth Conlon	Broadridge Financial Solutions	Donald DeBolt	Confluence
Ross Connell	Brown Brothers Harriman	Dawn DeFreitas	Vanguard
Bill Connolly	Putnam Investments	Kelly Dehler	First Trust portfolios
Robert Conti	Neuberger Berman Investment Advisers LLC	Ryan Del Giudice	Griffin Capital
Greg Cook	J.P. Morgan	Kristine Delano	NextShares Solutions LLC
Christopher Cooke	Linedata	Bernard Delbecque	EFAMA
Adam Cooper	Driehaus Capital Management	Mark Delcoco	Investment Company Institute
John Corbisiero	Morgan Stanley	Nicholas Deliso	Depository Trust & Clearing Corporation
Mary Corcoran	Invesco	Jillian DelSignore	JPMorgan Asset Management
Kelly Cornwell	The Vanguard Group	Anne DeMay	NICSA
Amy Corwin-House	Citi	Farrell Denby	BlackRock
John Costantino	SSGA	Nancy Denney	Trillium Asset Management, LLC
George Costas	DST Asset Manager Solutions, Inc.	Michael DeNofrio	BNY Mellon
Edward Costello	Federated Investors	Larry Depp	Deloitte
Susan Cote	SEI Mutual Funds	Peter DeProft	EFAMA
Scott E Couto	Columbia Threadneedle Investments	Robert Deutsch	JP Morgan ETF Board
Patricia Cox	1290 Funds / AXA	Sanjeev Dev	T. Rowe Price
Pamela Cox	Baillie Gifford	Jim Devaney	PGIM Investments
Catherine Coyne	National Quality Review	Leonard Di Pietro	Tait Weller
		Agnes Diaz	Neuberger Berman Investment Advisers LLC
		Gary DiCenzo	360 Funds

Douglas Dick	Dechert LLP	Brent Farmer	MFS Investment Management
Mark Dickas	Investment Company Institute	Thomas Faust	Eaton Vance Corp.
Jim Diercksen	ACA Compliance Group	Micheline Faver	Voya Investment Management
William Dietrich	Ariel Funds	James Febeo	Fidelity Investments
Jason Dijak	Morningstar	Jane Feehan	Vanguard
Gerald Dillenburg	AMG Funds	Adam Feldstein	Strategic Insight
Jennifer DiValerio	Foreside	Laura Fergerson	Franklin Templeton Investments
Deborah Djeu	Loring Ward	Brian Ferko	BHR Institutional Funds
Deborah Docs	PGIM Investments	Chris Ferrara	TRowe Price
Michael Doherty	Ropes & Gray LLP	Brian Ferrie	Jensen Quality Growth Fund
Mary Anne Dolan	American Funds	John Fickle	Fidelity Corporate Actions Solutions
Will Dolan	Fidelity Corporate Actions Solutions	Terri Fiedler	AIG
Theodore Dolan	Bloomberg Media	Dave Fietze	CGM Funds
Peter Donatio	Columbia Threadneedle Investments	Nicole Filingeri	OppenheimerFunds
David Dong	China Universal Asset Management (HK) Company Limited	Randall Fillmore	Aquila Group of Funds
Dorothy Donohue	Investment Company Institute	Michael Finck	GlobeTax
Natalie Donohue	PNC	Carla Jane Findlay-Dons	Brown Brothers Harriman
James Donovan	JP Morgan Funds (23Wall Trust)	Joe Fink	Northern Trust
Mike Donowitz	Broadridge Financial Services	William Finnegan	AMG Funds
Robert Dorsey	Ultimus Managers Trust	Wayne Finnegan	BNP Paribas
Michael Doshier	Franklin Templeton Investments	Peter Finnerty	PwC
Andrew Dougherty	BNP Paribas	Anthony Fischer	UMB Fund Services
Michael Downer	Capital Research and Management Company	Heather Fischer	Charles Schwab
Matt Doyle	T. Rowe Price Associates	Michael Fitzgerald	Charles Sterling Group
Diane Drake	Mutual Fund Administration, LLC	Brian Fitzgerald	Brown Brothers Harriman
Anna Driggs	ICI Global	Scott Fitzgerald	State Street Corporation
Greg Drose	UMB Fund Services	Jim Fitzpatrick	NICSA
Lisa Druelinger	Wilmington Trust Investment Advisors	Martin Flanagan	Invesco
Jeffrey Duckworth	John Hancock Investments	Keith Fletcher	Harvest Volatility Edge Funds
William Duffy	Charles Schwab	Jennifer Flitton	Invesco
james Dunigan	PNC Bank - Retired	Mark Flynn	Virtus Investment Partners
John Durso	J.P. Morgan	Julie Flynn	Brown Brothers Harriman
Brian Dvorak	Vanguard	Margaret Flynn-Martin	Relationship Management Group
Martin Dziura	Investment Managers Series Trust	Goshka Folda	Strategic Insight
Chad Earnst	PGIM Investments	Eric Fortin	Charles Schwab Investment Management
Tom Eck	IBM	Jesse Fox	Charles Schwab
Carlyn Edgar	Atlantic Fund Services	Jennifer Foxson	OppenheimerFunds, Inc.
David Edlin	Cohen & Steers	Megan Frank	Allianz Global Investors
Alexandra Eggie	Diligent Corporation	Susan Frasu	BNY Mellon
Ahmed Elghazaly	Investment Company Institute	Paul Freeman	Deutsche Funds
Paul Ellenbogen	Broadridge	Linda French	Investment Company Institute
Emily Engelman	Fannie Mae	Jim Fricano	Wellington Management Company
Jeffrey Engelsman	TCW	Katherine Fries	U.S. Bancorp Fund Services, LLC
James Erceg	T. Rowe Price	Richard Froio	Eaton Vance
Jennifer Erskine	EY	Matthew Fronccke	DST Systems
Rajesh Eshwar	T. Rowe Price	Markus Fuchs	Swiss Funds and Asset Management Association SFAMA
Donnie Ethier	Cerulli Associates	Cary Fuchs	Principal Global Investors
Mark Evans	Confluence	Louis Fugazy	SourceMedia
Tom Evans	Investec Asset Management	Paul Fulmer	USAA
Michael Ewing	American Century Investments	Gary Fung	AXA Equitable
Aric Faber	SalesPage Technologies	David Fusco	Virtus Investment Advisers, Inc.
Lawrence Fahey	Eaton Vance Management	Valentin Galardi	Argentine Mutual Funds Association
Andy Falter	NICSA	Paul Gallagher	Brown Brothers Harriman
Imad Farhan	Investment Company Institute	Brian Gallagher	Columbia Funds

Peter Gallary	Investment Company Institute	Thomas Grande	GlobeTax
Lisa Gallegos	Franklin Templeton Investments	Christine Grande	PGIM Investments
Fabio Galli	Assogestioni	Steve Grande	DST
Michael Gallo	BNY Mellon	Ken G.Y. Grant	Unified Series Trust
Kevin Galvin	MUFG Union Bank, N.A.	John Gray	Envision Financial Systems, Inc.
Leslie Gambon	Charles Schwab Investment Management	Darryl Grayson	ACR Alpine Capital Research
Bart Gancher	Intech	Eamonn Greaves	SS&C GlobeOp
Hubbard Garber	Barrington Partners	Brian Green	StarCompliance
Richard Garland	Investec Asset Management	Nicole Greene	DST Systems
Craig Gaskin	TD Asset Management Inc.	Burton Greenwald	Franklin Templeton Funds
George C. W. Gatch	J.P. Morgan Asset Management	Daniel Greifenkamp	BBH & Co.
Michael Gaughan	American Growth Fund, Inc.	John Griffin	PricewaterhouseCoopers
David Gaunt	Strategic Insight	Bob Grohowski	T. Rowe Price
Gina Gavito	Capital Group	Mick Grunewald	Ultimus Fund Solutions
Martin Gawne	Ariel Investments	Bernard Grzelak	Lord Abbett
Frank Geccedi	DBX Advisors	Robert Guarnieri	Deloitte
Marissa Gehling	Mairs & Power Inc.	Candice Gullett	Investment Company Institute
Robert Geiger	Vanguard	Peter Gunas	Investment Company Institute
Carson Geiss	Pacific Funds	Mahendra Gupta	Credit Suisse Funds
Philip Gentry	Equity Trustees	Jennifer Gusman	Franklin Templeton
Bob Geppner	Franklin Templeton Distributors, Inc.	William Hackett	Matthews International Capital Mgmt, LLC
Charlie Geremia	National Financial Services	Elizabeth Hager	Lincoln Variable Insurance Products Trust
Robert Gerrard	T. Rowe Price	Catherine Halberstadt	Osterweis Capital Management
Jon Gezotis	Citi	David Halligan	SalesFocus Solutions
James Giallanza	Cohen & Steers	Jose Carlos Halpern	ANBIMA - Brazilian Financial and Capital
Edmund Giambastiani	Oppenheimer Funds	Doherty	Markets Association
Karen Gibian	Investment Company Institute	Theresa Hamacher	Morningstar Funds Trust
Danny Gilbert	Broyhill Assets	Sean Hamilton	Fidelity Investments
George Gilbert	Investment Company Institute	Lisa Hamman	IDC
Sheri Gilchrist	PGIM Investments	Joseph Hanczor	Spectrum Asset Management
Amy Gilfenbaum	Neuberger Berman	Sean Hanna	MFWire
Christine Gill	BNY Mellon	James Hannigan	Blackstone
James Gillespie	Sterling Capital	Daniel Hanrahan	US Bancorp Fund Services
David Gilliam	T. Rowe Price	Janet Hanson	Deloitte Consulting
John Gilner	T. Rowe Price Associates	Tim Hargesheimer	Donnelley Financial Solutions
Theresa Gilpin	The Vanguard Group	David Harris	Dechert LLP
Edward Giltenan	T. Rowe Price	Gary Harris	ALPS/DST
Kevin Gleason	Voya Funds	Richard Harrison	Diligent Corporation
Catherine Gloner	Waddell & Reed	Karl Hartmann	CSOP ETF Trust
Hannah Glover	Ignites	Keith Hartstein	PGIM Investments' mutual funds
Jennifer Goerlich	BNY Mellon	Greg Haygood	Motley Fool Asset Management
Anne Goggin	Pax World Funds	Tyler Haynes	Computershare
Tim Gokey	Broadridge Financial Solutions	Deborah Hazell	HSBC Global Asset Management (USA) Inc.
Andrew Goldenbaum	Investment Company Institute	Girard Healy	Accenture
Samuel Goldstein	Lincoln Financial Group	Anne Hebard -Duduch	DST Systems
Zhann Goloborodko	Investment Company Institute	Thomas Hefty	Artisan Partners Funds
Karen Golz	University of Illinois Foundation	Jason Heinhorst	FUSE Research
Amy Gordon	DST Systems	Jane Heinrichs	Investment Company Institute
Robert Gordon	Brown Brothers Harriman	Dave Heiny	Artisan Partners
George Gorman	Eaton Vance Funds	Nancy Heller	Schwab Funds
James Gorman	Morgan Stanley	Robert Helm	Dechert LLP
Scott Gormley	Franklin Templeton Investments	Helene Heman	NRS
Cory Gossard	ALPS Fund Services, Inc.	Andrew Henderson	Eversheds Sutherland
Jason Gounaris	T. Rowe Price	Bethany Hendricks	Franklin Templeton Investments
Mike Graham	Capital Group	Amy Henegan	Advisors Asset Management, Inc.

Tom Henk	PwC	Ankush Jain	Morgan Stanley
Neil Hennessy	Hennessy Funds	Ramsin Jajoo	Morningstar Inc
Ryan Henrich	Fifth Third Bank	Amanda James	Vanguard
Amy Herman	The Art of Perception, Inc.	Hans Janssen Daalen	Dutch Fund and Asset Management Association
Diana Herrmann	Aquila Investment Management LLC	Steph Jaouen-Starr	Charles Schwab Investment Mangement
Alan Herzog	Bridge Builder Trust	W. Scott Jardine	First Trust Portfolios L.P.
Phil Herzog	Strategic Insight	Bob Jason	Oppenheimerfunds
Jon Hickey	Water Island Capital	Maurice Jenkins	Investment Company Institute
Stephanie Higby	USAA	Caroline Jensen	Investment Company Institute
Mary Ellen Higgins	Nuveen	James Jessee	MFS Investment Management
Jeffrey Hilk	Diligent Corporation	Sailesh Jha	Investment Company Institute
Leo Hill	Transamerica Funds	Adeel Jivraj	Ernst & Young
Brian Hirsch	Nationwide Funds Group	Alice Joe	Fidelity Investments
Kelly Hitchcock	Investment Company Institute	John Johmann	BNP Paribas
Soyoung Ho	Thomson Reuters	Diane Johnson	Diligent Corporation
Scot Hoffman	Dodge & Cox	Arthur Johnson	Fannie Mae
Therese Hogan		Adam Jonas	Morgan Stanley
Michael Hogan	Charles Schwab Investment Management	Thomas Jones	Columbia Threadneedle Investments
Sarah Holden	Investment Company Institute	LaFleur Jones	Investment Company Institute
Craig Hollis	DST Systems	Brian Jones	Envision Financial Systems, Inc.
Rhonda Holmes	ICMA-RC	Jamie Jones Ezefili	The Northen Trust Company
Mary Davis Holt	American Funds	Eugene Jooste	Association for Savings and Investment - SA
Diana Horhoge	TIAA	Christian Jordan	Cerulli Associates
Tim Hornbrook	State Street	Peter Joyce	Deloitte
Yvette Hu	E Fund Management Co., Ltd.	Alison Kahn	Citi
Nellie Huang	Kiplinger's Personal Finance magazine	Harvey Kalman	Equity Trustees
Julie Hubbard	Brown Brothers Harriman	Roberta Kameda	Dodge & Cox
Jason Hubersberger	Edward Jones	Armin Kammel	Austrian Association of Investment Fund Management Companies
Allen Huffman	Investment Company Institute	Joanne Kane	Investment Company Institute
Sandy Hughes	UMB Fund Services	Eric Kane	Gemini Fund Services, LLC
Yie-Hsin Hung	NYLIM	Rahul Kanwar	SS&C GlobeOp
David Hunt	PGIM, The Investement Business of Prudential	Reshma Kapadia	Barron's Magazine
Hugh Hurley	BlackRock (Retired)	Bennett Kaplan	Accenture
Patrick Hurley	OppenheimerFunds	Samuel Karetsky	Harding Loevner Funds
Den-Ny Hwang	Investment Company Institute	Anita Karier	Invesco
Collyn Iblings	Mairs & Power	Lauren Kast	PNC Funds
Malve Ildefonso	BDO USA, LLP	Carl Katerndahl	Nuveen Investments
Vincent Ingham	EFAMA	Brenda Kathurima	Investment Company Institute
James Interrante	John Hancock Financial Services	Linda Kaufmann	Tait Weller
Andrew Iseman	Scout Investments, Inc.	Robert Kearney	Milestone Group
Nadia Ishmael	Investment Company Institute	Brian Keating	ZS
Corey Issing	Neuberger Berman Group LLC	Gunjan Kedia	U.S. Bank
Tatiana Itikawa	ANBIMA-Brazilian Financial and Capital Markets Association	Matt Keeggan	Workiva
Tea Ivanovic	KANTER	James Keenan	Citi
Kathleen Ives	OFI Global Asset Management	Joseph Keenan	BNY Mellon
Hillary Jackson	Fund Board Views	Michael Keenan	MFS Investment Management
William Jackson	Computershare Fund Services	Jay Keeshan	Management Practice Inc.
Jay Jackson	Thrivent	Darryl Keeton	Homestead Funds
Doug Jackson	Pacific Funds	Paul Keith	Wolters Kluwer
Rubesh Jacobs	ZS	Christopher Keller	Harris Associates / Oakmark Funds
Josh Jacobs	J.P. Morgan	Burton Keller	Delta Data
Timothy Jacoby	Edward Jones Money Market Fund	Jason Kellogg	RSM US LLP
Curt Jacques	Macquarie Group	Hugh Kelly	Harbor Funds

Joseph Kelly	Dunham & Associates	Jeanne LaPorta	State Street Global Advisors
Sean Kennedy	SEI	Georg Lasch	BNP Paribas Securities Services
Susan Kerley	MainStay Funds	Albert Laskaj	Cohen & Steers
Robert Kern	U.S. Bancorp Fund Services	Michael Latham	Goldman Sachs Asset Management
Brian Kerrane	Neuberger Berman	Mark Lavan	Legg Mason
Mike Kerrigan	Accenture	Colleen Lavery	Eaton Vance
Elizabeth Kessler	Diamond Hill Funds	Keith Lawson	Investment Company Institute
Sarah Ketterer	Causeway Capital LLC	Greenstein Leah	T Rowe Price
Jennifer Kienbaum	US Bank	Polly LeBarron	National Quality Review
Gregory Kieselowsky	BBD	Mark Lee	Parnassus Investments
Kelly Kilroy	DTCC	Richard Lee	Allianz Global Investors
Tina Kilroy	Investment Company Institute	Grace Lee	PGIM
Julia Kim	Korea Financial Investment Association	Hwantaee Lee	Korea Financial Investment Association
James Kimmel	Olstein Capital Management, L.P.	Judy Lee	Investment Company Institute
Daniel Kingsbury		John Lee	US Securities and Exchange Commission
Keitha Kinne	Managers Investment Group	Kirk Lehneis	New York Life Investment Mgmt
Brandon Kipp	Ultimus Fund Solutions	Thomas Lemke	J.P. Morgan Exchange-Traded Fund Trust
Tanya Kirchner	Investment Company Institute	Russell Lemley	Capital Research and Management Company
Jane Kirkland	State Street	Gary Lemon	Lincoln Variable Insurance Products Trust
David Kittredge	T. Rowe Price	Destiny Lentz	Broadridge
Lisa Klassen	Edward Jones	Thomas Leonard	Lincoln Variable Insurance Products Trust
Jennifer Knapp	SEI	Robert Leonardi	First Investors
Timothy Knierim	Morgan Stanley	Bruce Leto	Stradley Ronon LLP
Peter Knipe	Advisors Asst Management, Inc.	Lawrence Levine	MFS Investment Management
Thomas Knipper	IMST-II	Brian Lewbart	T. Rowe Price
Francis Knox	John Hancock Investments	Mary Kay Lewis	Vanguard
Tina Kodama	Hotchkis and Wiley Capital Management	Robert Lewis	Broadridge Financial Solutions
Paul Koeniger	Cerulli Associates	Wen Li	China Universal Asset Management
Walter Koller	Societe Generale Securities Services	Dominick Liberatore	Investment Company Institute
Teresa Kong	Matthews Asia	Michael Liberatore	Broadridge Financial Solutions
Christopher Kornafel	OppenheimerFunds	Lisa Light	DST Systems
Adam Kornegay	Ultimus Fund Solutions, LLC	Hopeton Lindo	Compliance Solutions Strategies
Fred Kosanovic	Access Data, a Broadridge Company	Jerry Linenger	
Merrilyn Kosier	Ariel Investments	Randy Linscott	M3Sixty
Linda Kostic	T. Rowe Price	David Liu	Galliard Capital Management
Cleo Kotis	Tocqueville Trust	Susan Livingston	BBH Trust Fund
Lee Kowarski	DST Systems	Henry Loc	Investment Company Institute
Kelly Kraft	Weitz Investment Management	John Loder	Ropes & Gray LLP
Paul Kraft	Deloitte	Nicholas Lombardo	J.P. Morgan
Mary Kramer	Investment Company Institute	David Long	Edward Jones
Sean Kreiger	Jackson Square Partners	Bruce Long	Baillie Gifford Overseas
Michelle Kretsch	Investment Company Institute	Dan Lortz	SEI
Mary Kriegsfeld	Strategic Insight	Patricia Louie	AXA Equitable Funds Management Group
Arthy Kumar	Workiva	Irne Lu	Macquarie Investment Management
Glenn Laatsch	Morningstar, Inc.	Sandra Lu	Links Law Offices
Stephanie Lacasse	Investment Company Institute	Reese Lucas	Temenos Multifonds
Jim LaCasse	Brown Brothers Harriman	David Lui	Modern Compliance
Christopher Lacey	BNY Mellon	Ryan Lund	Columbia Threadneedle Investments
Paul Lacher	Phoenix Systems Inc	Shaun Lutz	Investment Company Institute
Jamey Lamanna	Lord Abbett	Michael Luzzatto	First Eagle Investment Management, LLC
David Lamb	Nuveen	Sean Lynch	BNY Mellon
Michelle Lancaster	Chiron Investment Management, LLC - SEI	Carol Lynde	Bridgehouse Asset Managers
Amy Lancellotta	Independent Directors Council	Brenda Lyons	State Street Corporation
David Langdale	SEI Private Trust Company	Shawn Lytle	Macquarie Investment Management
Adam Langley	Angel Oak Capital Advisors	Melissa Macatuno	

Joe Maccone	AMG Funds	Trevor McLeod	T. Rowe Price
Lonnie Macdonald	Vestmark	James McNally	Brown Brothers Harriman
Mike MacNaught	MFS Investment Management	James McNamara	Goldman Sachs Trust
Brian MacPhee	John Hancock	Mike McNamee	Investment Company Institute
Lawrence Maffia	J.P. Morgan ETF Trust	Michael McNeill	DST
Frank Maher	Transamerica	Shawn McNinch	Brown Brothers Harriman
Kristi Maher	First Trust Portfolios L.P.	Lawrence McQuaid	DST
Marc Mahon	Parnassus Investments	Rachel McTague	Investment Company Institute
James Mahoney	Tait Weller	William McVay	AdvisorShares Funds
Patricia Maleski	Morgan Stanley Mutual Funds	Jon Meacham	Author - The Soul of America
John Malone	Amundi Pioneer Distributor, Inc.	Jacqueline Meere	New York Life
Michael Maltby	Eagle Investment Systems	Ashok Mehta	Ameriprise Financial
Mark Manassee	ICON Funds	Joe Melcher	Hartford Funds
Jane Mancini	State Street Corporation	Carlos Melville	Columbia Threadneedle Investments
Julie Mansmann	Fund Action	Sapna Mendiratta	New York Life Insurance Company
George Mantice	Command Financial	Michelle Mesack	JPMorgan Chase & Co.
Barbara March	BridgePoint	Mary Messer	J.P. Morgan
Scott Marcus	Delta Data	Adri Messerschmidt	Association for Savings and Investment - SA
Frank Maresca	Broadridge	Terry Metzger	DST Systems
Kristin Mariani	Janus Capital Group, Inc.	Ryan Meyers	Pageant Media
Natalie Marin	OppenheimerFunds	Carleen Michalski	Macquarie Investment Management
Roddy Marino	Brinker Capital	Matt Michaud	
HJ Markley	Goldman Sachs Funds	Stefano Michelagnoli	HSBC Global Asset Management
Donna Marley	Brinker Capital Destinations Trust	Charles Miller	Investment Managers Series Trust
Jeffrey Martell	Cohen & Steers Capital Management	Amy Miller	U.S. Securities and Exchange Commission
Laura Martin	SIFMA AMG	Jamie Miller	Freddie Mac
Jay Martin	Citi	Charles Miller	Shared Assessments
Paul Martin	Morgan Stanley	Maureen Mitchell	Natixis Investment Managers
Elisabeth Martinetz	Tait Weller	Chris Mitchell	NextShares Solutions LLC
Brittany Maselli	Investment Company Institute	Morris Mitler	Investment Company Institute
Dennis Mason	Forum Funds	Steven Miyao	DST Systems
W. Edward Massey	Lieff Cabraser Heimann & Bernstein LLP	Eruch Mody	Brown Brothers Harriman
Michael Mastroianni	J.P. Morgan Asset Management	John Moninger	Eaton Vance Distributors, Inc.
Prema Mathai-Davis	Invesco Funds	Erin Montgomery	Charles Schwab
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Jocelyn McBride	Computershare Fund Services	Kirk Moore	Columbia Threadneedle Investments
Michael McBrinn	Wolters Kluwer	Sheila Moore	Investment Company Institute
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Traci McCormack	Fidelity Investments	Mark Moran	FIS
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Thomas McCrocklin	Morgan Stanley	Michael Morosi	Investment Company Institute
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Sheila McDonald	Investment Company Institute	Nancy Morris	Wellington Management Company LLP
John McDonough	OppenheimerFunds	Bailey Morris-Eck	American Funds
Joelle McEnaney	Voya Investment Management	Rob Mortensen	UMB Fund Services
Colin McFarland	Harris Associates	Benjamin Moser	Aberdeen Standard Investments
Daniel McGee	Barings LLC	Nicolette Moser	Allianz Global Investors
Joseph McGill	Lord Abbett	Derrick Mosley	Franklin Templeton
Ellen McGlynn Koke	PGIM Financial	Todd Moyer	Confluence
Jeff McGuire	Strategic Insight	Priscilla Moyer	Franklin Templeton Investments
Jeff McHale	Investment Company Institute	Mary Moynihan	Perkins Coie
Mike McKeigue	Tortoise	Peter Muldoon	Temenos Multifonds
Sandy McKenna	BNY Mellon	Karym Murphy	Hengtian Services LLC
Sean McKeon	FundX Investment Group	Paul Mussoni	IDC
Terri McKinney	American Beacon Funds	Samuel Myett	Investment Company Institute



Eva Mykolenko	ICI Global	Jessica Palmer	Goldman Sachs Mutual Funds
Avi Nachmany	Avi Nachmany Consulting	Joseph Palombo	RSM US LLP
Krishna Nadella	Bloomberg L.P.	Tom Pandick	Tocqueville Trust
Linda Namias		Erika Panyard	U.S. Bancorp Fund Services
Jeff Naylor	Investment Company Institute	Joseph Paolo	AXA Equitable Funds Management Group, LLC
Louis Nazzaro	MUFG Union Bank	Irene Papadoulis (Pappas)	Dreyfus Transfer Inc
Mark Nerud	Jackson National Asset Management LLC	Mary Papamarkou	Hotchkis & Wiley
Robin Nesbitt	Charles Schwab	Alec Papazian	John Hancock Investments
Joseph Neuberger	U.S. Bancorp Fund Services	James Pappas	ACA Compliance Group
Catherine Newell	Dimensional Fund Advisors	Steve Papulak	SEI
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Nicholas Nichols	DST	Monica Lea Parry	Morgan, Lewis & Bockius LLP
John Nickodemus	Putnam Investments	John Pasco	World Funds Trust
Catherine Nitschke	J.P. Morgan	Patrick Patalino	Baron Capital
Jim Nolan	Citi	Kristina Patyjewicz	John Hancock
Anna Nordseth	Morningstar, Inc.	Monique Pecchia	Russell Investments
Ben Northover	Money-Media	Joe Pennini	Brown Brothers Harriman
Charles Novicki	Strategic Insight	Steve Perazzoli	PwC
Laura Nudy	Vanguard	George Pereira	Charles Schwab Investment Management
Michael Nugent	Morgan Stanley Funds	Rafael Perez	BNP Paribas
Jay Nusblatt	Donnelley Financial Solutions	Jean-Claire Perini	Investment Company Institute
John Oakes	RiverNorth Mutual Funds	Scott Perkins	Computershare Fund Service
Helen OBrien	The International Investment Funds Association	James Perna	Homestead Funds
Paul O'Brien	Aquila Group of Funds	Louis Perwien	Freddie Mac
Matthew O'Connor	Capital Group	Paul Pfeiffer	T. Rowe Price
Chris O'Dell	Morgan Stanley Investment Management Inc.	Thomas Pfister	Confluence
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Alison O'Donnell	New York Life	Christine Pierangeli	Charles Schwab
Kelly O'Donnell	Amundi Pioneer Asset Management	Chris Pini	Money-Media
Paul O'Dowd	Pageant Media	Betsy Piper Bach	AdvisorShares Funds
Glenn O'Flaherty	Aquila Group of Funds	Cheryl Pipia	T. Rowe Price
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Erik Olsen	ACA Compliance Group	Laurie Pistilli	Morgan Stanley
Lori Olson	Ivy Funds	Brian Pittluck	PIMCO LLC
Jennifer Olson	Investment Company Institute	Michael Piowar	U.S. Securities and Exchange Commission
Paul O'Neil	Hengtian Services LLC	Jonathan Pliszka	Morningstar
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Don Osmani	New York Life Investments	Manoj (Tito) Pombra	Matthews Asia
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Marsha Otto	Brandes	Ori Porat	Fiducia Optime
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David Owen	Allianz Global Investors	Liam Power	Donnelley Financial Solutions
Joanne Pace	Oppenheimer Funds	Sheryl Pressler	Voya Funds
Sharon Pacheco	Pacific Life	Martin Prestage	Investment Company Institute
Steven Paggioli	AMG Funds	Ryan Price	Linedata
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Scott Palmer	ParkLexington Advisors	Christina Pron	Lincoln Financial Group

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Nathalia Pryce	SEI	Liz Roth	Investment Company Institute
Cynthia Pullom	Investment Company Institute	Kristi Rowsell	Harris Associates L.P.
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Benjamin Quigley	Deloitte	Justin Ryder	Linedata
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John Randall	Investment Company Institute	Derek Saliba	Manulife Investments
Randy Randall	William Blair Funds	Shannon Salinas	Investment Company Institute
Clara Ranzetta	Edward Jones	Tami Salmon	Investment Company Institute
Thomas Rath	Lincoln Variable Insurance Products Trust	David Salter	Baillie Gifford Funds
Karen Rau	Fiduciary Counselling, Inc.	Janet Salter	Investment Funds Institute of Canada
Ronald Redell	DoubleLine Funds	Richard Salus	Macquarie Investment Management
Joe Redwine	Advisors Series Trust	Mark Salzburg	SEC, Trading and Markets
Matt Reed	Strategic Insight	Alexander Samuelson	Neuberger Berman
Mark Reed	CGCM Funds	Lee Sanders	Morningstar
Adam Reeve	T. Rowe Price	Erwin Ralph Sanft	E Fund Management (HK) Co., Ltd.
Alan Reid	Reid Partners	Jill Santandreu	SalesFocus Solutions
Brian Reid	PGIM Funds	Joseph Santoro	Deutsche Bank
Kirk Reid	OppenheimerFunds	Tom Sarkany	Value Line Funds
Debra Reilly	Computershare Fund Services	Michael Saunders	Brown Brothers Harriman
Brian Reilly	NextShares Solutions LLC	Elizabeth Savino	PwC
Neill Reilly	SS&C	Mike Saylor	T. Rowe Price
Patrick Reinkemeyer	SilverPepper LLC	Michael Scalzi	MUFG Investor Services
Richard Reiter	Harding Loevner	Ashley Scarborough	Investment Company Institute
Chad Renfro	Fidelity	Paul Schaeffer	IndexIQ ETF Trust
Alana Reome	Jackson National	Edwin Schall	Ernst & Young
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Meredith Rice	Market Strategies	Heather Schiele	Captive Resources LLC
Kristen Richards	Chiron Investment Management via SEI	Clifford Schireson	Hardman Johnston Global Advisors
Benjamin Richer	Lincoln Financial Group	Thomas Schmidt	Prism Multi Strategy Fund
Chris Riggio	Strategic Insight	Kyle Schmiegel	Charles Schwab
David Riley	Delta Data	Michael Schnitman	Mackenzie Investments
Jeffrey Ringdahl	American Beacon Advisors, Inc.	Mark Schoeff Jr.	InvestmentNews
Bob Rinicella	SEI	Daniel Schrass	Investment Company Institute
Deonne Rivera	Franklin Templeton Investments	Charles Schreiber	BBH Trust
Emily Robbins	Financial Times	Laura Schuld	UMB Fund Services
Donald Roberson	ProShares	Scott Schulenburg	UMB Fund Services
Peter Roberson	Charles Schwab	Chante Schultz	UMB Fund Services
Kenneth Robins	Fidelity Investments	Deborah Schunder	Global Atlantic Investment Advisors
Blanford Robinson	Investment Company Institute	Jace Schuppan	Ultimus Fund Solutions
Chris Robinson	National Financial Services	Erik Schwendenman	Computershare / Georgeson
Nick Rodriguez	Investment Company Institute	David Scott	Matthews Asia
Randi Jean Roessler	Davis Selected Advsiers, L.P.	Christy Sears	American Beacon Funds
Noah Rogers	Donnelley Financial Solutions	John Sebulsky	BlackRock
Bryan Rooney	The Northern Trust Company	Mark Seger	Ultimus Fund Solutions, LLC
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Harvey Rosen	Fidelity Investments	Anthony Seiffert	Capital Research and Management Company
David Rosen	Morgan Stanley	Jason Seligman	The Investment Company Institute
William Rosensweig	Brown Brothers Harriman	Moritz Sell	Aberdeen Singapore Fund
Chris Rosenthal	BNY Mellon		

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Robert Serafin	MetLife	Brandon Spooner	Temenos Multifonds
Alok Sethi	Franklin Templeton Investments	John Spratt	T Rowe Price
James Shaw	The RBB Fund, Inc.	Janet Squitieri	JPMorgan
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David Shentu	AXA Equitable	Frances Stadler	Investment Company Institute
Mary Anne Shields	Investment Company Institute	John Stadler	PricewaterhouseCoopers
John Shields	Domini Impact Funds	Brittany Starr	Investment Company Institute
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Kristine Shoemaker	Computershare	Joan Steel	Loyola Univeristy Chicago
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Jason Sibley	RSM US LLP	Paul Stevens	Investment Company Institute
John Siciliano	PricewaterhouseCoopers	Andrew Stevens	Allianz of America
Rudolf Siebel	BVI	Jill Stevenson	U.S. Bancorp Asset Management
Varinia Siefker	Dodge & Cox	Shannon Steward	OppenheimerFunds
Jonathan Siegel	T. Rowe Price	Theresa Still	New York Life Investments
Jonas Siegel	Trust for Professional Managers	Joe Stockton	TD Ameritrade
Joseph Signora	Consulting Group Capital Markets Funds	Michael Stockton	Capital Research and Management Company
Russell Simon	Broadridge	Katherine Stoner	Great-West Financial
Stephen Simon	Clearwater Investment Trust	Robert Straniere	RBB Funds Group
Linda Singer	Angel Oak Capital Advisors, LLC	Frank Strauss	Accenture
Deborah Singh	AXA Equitable	Bill Strickland	Dodge & Cox
Knox Singleton	American Funds	Andrew Strnad	Quasar Distributors, LLC
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Kristi Slavin	Brighthouse Funds	Bryan Sutherland	Gemini Fund Services, LLC
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Teresa Sloan Yancik	Vanguard	Giles Swan	ICI Global
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Julie Smith	Touchstone Funds	Brian Swanson	MUFG Union Bank
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Steve Smith	Vestmark	Brad Swenson	ALPS
Evan Smith	ReFlow Services, LLC	Timothy Taggart	American Growth Fund
Anne Smith	Kiplinger's Personal Finance	Louis Taite	Lord Abbett
Tara Smith	Vanguard	Deborah Talbot	Carillon Family of Funds
Gerald Smith	Smith Graham & Company	Maurizio Tallini	Domini Impact Investments LLC
Franklin Snyder	Investment Company Institute	Julie Tedesco	JP Morgan Chase
Robert Sobol	TD Ameritrade	Patrick Temple-West	Politico
James Sonne	MassMutual	Roy Templin	Goldman Sachs Mutual Funds
Ted Sotir	Independent Director	Peter Tenggren	BNY Mellon
Anne Soucy	Nationwide Financial	Gary Tenkman	Ultimus Fund Solutions, LLC
Michael Spangler	Nationwide Investment Management Group	Jeaneen Terrio	Invesco
Richard Specht	Broadridge	Dana Terry	Georgeson/Computershare
James H Speed Jr.	Hillman Capital Management Trust	Ellen Terry	The New America High Income Fund, Inc.
		Joan Tesla	Confluence

John Tesoro	Bridge Builder Funds (Edward Jones)	James Vaughn	OppenheimerFunds
Kerry Thiede	Northern Trust	Jason Vaughn	DST
Eric Thole	U.S. Bancorp Asset Management, Inc.	Karen Vavra	BNY Mellon
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Shundrawn Thomas	Northern Trust Asset Management	Domenick Vecchione	Ignites
Jonathan Thomas	American Century Investments	Rudy Veerjee	Pacific Life Funds
William Thomas	ETFS Trust	Stephen Velie	Thornburg Investment Management
Mary Thomey	T. Rowe Price	Amy Veloz Payano	ICI Mutual
Camille Thommes	ALFI	Peggy Vena	Citi
Garrett Thornburg	Thornburg Investment Management	Jason Venner	Charles Schwab
Matt Thornton	Investment Company Institute	Andrew Vermilye	Fidelity Investments
Troy Thornton	Goldman Sachs	Sean Vincent	Vanguard
Robyn Tice	Eaton Vance	Spencer Virta	Vanguard
Laura Tillman	Homestead Funds	Jake Vogel	Cohen & Company
Jackie Tilton	National Quality Review	Bradley Vogt	Capital Research Company, Inc.
Mike Tipton	Strategic Insight	Stefani VonHoltum-Niesent	ALPS
Brian Tormollan	State Street	Jason Vorhees	ERG
Peter Townsend	Brinker Capital Destinations Trust	Dawn Vroegop	Bighthouse
Patrick Townzen	DoubleLine	John Vrysen	John Hancock Life Insurance Company
Stephanie Tracey	FilePoint	Rex Wackerle	Prudential Government Relations
Van Tran	Jackson Square Partners, LLC	Robert Wade	Franklin Templeton Funds
Steve Treanor	Investment Company Institute	Michael Wagner	Value Line Funds
Bruce Treff	Deloitte	Richard Wagner	Tait Weller
Jan Trembley	Macquarie Investment Management	Robert Wagner	Federated Investors
Mark Trenchard	Putnam Investments	Craig Waincott	Brandes Mutual Funds
Robert Troccoli	Invesco Funds	Staci Walls	SalesFocus Solutions
Robert Trower	DST Systems	John Walsh	Sutherland Asbill & Brennan LLP
William Truscott	Columbia Threadneedle Investments	Donal Walsh	BNY Mellon
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George Tsiaras	SEI	Mitch Walter	EY
Atsushi Tsuchiya	Japan Investment Trusts Association (JITA)	Susan Walzer	Carillon Family of Funds
Rita Tucci	QMA	Charles Wang	IFIC
Sean Tuffy	Citi	I-MIN Wang	Securities Investment Trust and Consulting Association of the R.O.C.
Vivian Tung	Brown Brothers Harriman	Debbie Ward	Managed Portfolio Series
Marshall Turner	AllianceBernstein Funds	Mark Ward	First Investors Family of Funds
Brenda Turner	Investment Company Institute	Russell Warren	Milestone Group
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Hepsen Uzcan	DWS	Irene Weis	AMG Funds
David Vallon	Natixis Advisors, L.P.	Scott Wennerholm	Eaton Vance Funds
Owen Van Essen	Thornburg Funds	Alexander Wentzel	PricewaterhouseCoopers
Amy Van Gundy	Oppenheimer Funds	Mallory Werthamer	Investment Company Institute
Andre van Heerden	Investec Asset Management	John Weston	Lincoln Financial Group
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Daniel Vandivort	Oppenheimer Funds	Thomas Wiedecker	Envision Financial Systems
Bryan Varvel	FINRA	Terrie Wiedenheft	Touchstone Investments
		Tina Williams	Dimensional Fund Advisors

Robert Williams	Hengtian Services LLC	Linda York	Market Strategies International
Elaine Williams	AXA Equitable	Gary Young	Diamond Hill Funds
Stanley Wilson	Fund Action	Robert Zack	ARK ETF Trust
Gena Wilson	PricewaterhouseCoopers	John Zader	Investment Managers Series Trust
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Aaron Wong	SalesFocus Solutions	Janet Zavistovich	Investment Company Institute
Elise Woods	Computershare Fund Services	Ann Zeiler	Northern Trust
Rana Wright	Harris Associates	Dan Zemanek	Driehuas Mutual Funds
Louis Wright	KNEIP	John Zerr	Invesco
Richard Wuchte	Toppan Vintage	Jon Zeschin	Matthews Asia Funds
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Sue Yang	TIAA	Elena Zistakis	Morningstar
Mary Yaranon	BNP Paribas	Jessica Zito	ICMA-RC
Sandy Yeager	Columbia Funds		
David York	AMG Funds		

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