



2019 GMM

MAY 1-3 • MARRIOTT WARDMAN PARK HOTEL • WASHINGTON, DC

ATTENDEE LIST BY NAME

as of 4/22/2019

Chris Ackerson	AlphaSense	Jeffrey Baccash	BNP Paribas
Brad Adams	Tortoise Capital Advisors, L.L.C.	Paul Bachtold	Salient Partners, L.P.
Danielle Adamson	State Street	Peter Baird	National Regulatory Services, Inc.
Vijay Advani	Nuveen	Mary Baker-Balady	J.P. Morgan Chase & Co.
Danielle Agrapides	PricingDirect Inc.	Kristin Banker	Delta Data
Greg Ahern	Sard Verbinen & Co.	Sam Barber	Markit North America, Inc.
Stephen Alderman	Brighthouse Funds	William Baribault	Richard Nixon Foundation
Olwyn Alexander	PricewaterhouseCoopers LLP	Janice Barnwell	Depository Trust & Clearing Corporation
Julie Allecta	Salient Funds and Litman Gregory Masters Funds	Karen Barr	Investment Adviser Association
John Alsheski	SEI	Kathleen Barr	William Blair Funds
Nimish Amin	Diligent	Donna Barrette	Professionally Managed Portfolios Trust
Kyle Andersen	Edward Jones Investments	Virginia Barry	ICI Mutual Insurance Co.
Brandon Anderson	SS&C Technologies	Wendy Barta	J.P. Morgan Asset Management
Charles Andrews	Capital Research and Management Company	Debbie Bartel	Franklin Templeton Services, LLC
Michael Andrews	SS&C Technologies	Ron Bass	GuideStone Funds
Anthony Anella	SEI Investments Management Corporation	Peter Bassler	eSecLending
Shelly Antoniewicz	Investment Company Institute	Stuart Bateman	Franklin Templeton
Zach Antonucci	Brown Brothers Harriman	Marguerite Bateman	Schiff Hardin LLP
Daniel April	Thompson Hickey Cunningham Clow April & Dolan, P.A.	Ann Torre Bates	Franklin Templeton
Erlinda Aquí	US Securities and Exchange Commission	T. Neil Bathon	FUSE Research Network LLC
Lesley-Anne Archibald	Baillie Gifford Funds	John Baumgardner	Sullivan & Cromwell LLP
Yuval Ariav	FundGuard	Theodore Beck	Driehaus mutual funds
Jane Armstrong	Artisan Partners	Matthew Beck	Investment Company Institute
Hugh Armstrong	PricewaterhouseCoopers LLP	Cheryl Beebe	GSTII
Jeanne Arnold	Investment Company Institute	Antoinette Behan	Toppan Merrill
Jeff Aronsohn	Federated Investors	Natalie Bej	Vanguard
Anthony Artabane	Anthony Artabane CPA, PLLC	Matthew Belnap	Cerulli Associates
David Ater	Thornburg Investment Trust	Barry Benjamin	Morningstar Funds Trust
Whitfield Athey	Delta Data	Scott Benjamin	PGIM Investments, LLC
Mary Athridge	Legg Mason	Michelle Benner	UMB Financial Corporation
Don Auerbach	Investment Company Institute	Christina Benoit	Archer
Joy Ausili	Investment Managers Series Trust	Judy Benson	Barrington Partners
		Kenneth Bentsen	SIFMA
		Alyssa Bentz	U.S. Bancorp Asset Management, Inc.

Glen Bergert	ICON Funds	Toni Bugni	The Northern Trust Company
Patrice Bergé-Vincent	ICI Global	Stephanie Bullington	OppenheimerFunds, Inc.
Lana Bergstein	Dimensional Fund Advisors LP	Sian Burgess	Fidelity Investments
Emmy Bernard	Foreside Financial Group	Donald Burke	Duff & Phelps Funds and Virtus Funds
Kerriane Berneck	BlackRock	Bryan Burke	Federated Investors, Inc.
Michael Bessel	Park Avenue Institutional Advisers LLC	Garrett Burke	IHS Markit
Scott Betz	Palmer Square Capital Management LLC	Shane Burke	Legg Mason Partners Fund Advisor, LLC
Janet Bienkowski	MFS Investment Management	Allana Burke	Strategic Insight
Karin Billias	Depository Trust & Clearing Corporation	Walt Burkley	Capital Group and Research Management
Brooke Billick	Artisan Partners Funds, Inc.	Marty Burns	Investment Company Institute
Brian Binder	Guggenheim Investments	Scott Burns	Morningstar, Inc.
Angela Bisagna	Computershare	Thomas Burt	BlackRock Funds
Laura Bissell	Okapi Partners LLC	John Buscher	Voya
Brett Black	BMO Funds	Ed Bush	American Growth Fund
Charles Black	Ultimus Fund Solutions, LLC	Kevin Byrne	Pacific Global Asset Management
William Blank	The Bank of New York Mellon Corporation	Kevin Cahill	Dechert LLP
Jennifer Block	Principal Funds	Nicolas Calcoen	EFAMA
Gregg Boland	Harbor Funds	Pete Callahan	AllianceBernstein
Pierre Bollon	Association Francaise de la Gestion Financiere	Karen Gent Campanale	Confluence
Sandra Bolton	Merrill	Michael Camuñez	Capital Research and Management Company
Joseph Bonner	American Funds	Richard Cancelmo	Bridgeway Capital Management, Inc.
Jeffrey Bonnevier	The Northern Trust Company	Dino Capasso	PGIM Investments, LLC
Renee Booth	Leadership Solutions, Inc.	Annette Capretta	Independent Directors Council
Kevin Bopp	New York Life Investment Management LLC	Chris Carpenter	T. Rowe Price
Rebecca Borden	Ernst & Young LLP	Amanda Carta	Diligent Corporation
Lisa Borders	Six Circles Fund	Jane Carten	Saturna Capital Corporation
Jennifer Borum	Vanguard	Andy Carthy	Donnelley Financial Solutions (DFIN)
Cindi Boudreau	Computershare Fund Services, Inc.	Gary Casagrande	Confluence
Paul Bourque	The Investment Funds Institute of Canada	Sarah Casey	Citi
Terry Bouthilet	Wells Fargo Bank	Henry Cashen	Blank Rome LLP
Nora Bowman	eSecLending	Frances Cashman	Legg Mason Global Asset Management
Jefferson Boyce	USAA Fund Company	Kathryn Cassidy	Goldman Sachs Funds
Ryan Boyd	Penn Mutual Asset Management, LLC	Michael Castino	U.S. Bank Global Fund Services
Jeff Boyle	MUFG Union Bank, N.A.	Matt Caulfield	Archer
Mark Bradley	Amundi Pioneer Asset Management	John Cembrook	Lord, Abbett & Co.
W. Patrick Bradley	Virtus Investment Partners	Maria Cenal	Refinitiv
Joshua Bradshaw	Cornerstone Advisors, Inc.	Matt Chambers	Horizon Investments, LLC
Joseph Brady	Lazard Asset Management	Kristen Chambers	J.P. Morgan Investment Management, Inc.
Ian Bragg	The Investment Funds Institute of Canada	Vanessa Chang	American Funds
Artemis Brannigan	PGIM Fixed Income	Virginia Chapman	National Regulatory Services, Inc.
John Braun	BBD, LLP	Ellyn Charters Zarracina	State Street Corporation
Joseph Bree	Confluence	Laura Chasney	T. Rowe Price Associates, Inc.
Linda Brenner	Investment Company Institute	Whitney Chatterjee	Sullivan & Cromwell LLP
Joseph Breslin	Forethought Variable Insurance Trust	Darren Check	Kessler Topaz Meltzer & Check, LLP
Brian Brett	Resolute Investment Managers	Robert Chersi	Thrivent Funds
Thomas Brock	EQ Advisors Trust	Andrew Chica	Cipperman Compliance Services, LLC
Jayson Bronchetti	Lincoln Financial Group	Howard Chin	Baillie Gifford
Matthew Brousse	SS&C Eze	Jennifer Choi	ICI Global
Michael Buberl	T. Rowe Price Associates, Inc.	Paula Cholmondeley	The Sorrel Group

David Chow	MainStay Funds and Van Eck Vectors ETF Trust	Chris Cummings	The Investment Association
Ludmila Chwazik	Water Island Capital, LLC	Lisa Curcio	The Royce Funds
Michael Cirelli	Charles Schwab Investment Management, Inc.	Dylan Curley	U.S. Bancorp Asset Management, Inc.
Kent Clark	Charles Schwab & Co., Inc.	Patrick Curtin	Citigroup Inc.
Michael Clark	Cohen & Steers Funds	Jude Curtis	PwC
Jason Clark	SEI	Stephen Cutka	American Funds
Stephen Clarke	Advanced Fund Solutiouons LLC	Daniel Cwenar	Broadridge Financial Solutions, Inc.
Jay Clayton	US Securities and Exchange Commission	Logan Daganhardt	Refinitiv
Nancy Cloran	SEI	Rita Dam	Investment Managers Series Trust
Steve Cobb	Lincoln Variable Insurance Products Trust	Diana Daniels	Goldman Sachs Mutual Funds
Ira Cohen	Angel Oak	Douglas Dannemiller	Deloitte & Touche LLP
Mary Colby	Charles Schwab Investment Management, Inc.	Dantest Dantest	Federated Investors
Jesse Cole	Goldman Sachs & Co.	Robert Darmanin	SS&C Technologies
Frank Colella	BNP Paribas Securities Services	Nickolaus Darsch	SS&C Technologies
J. Scott Coleman	Brinker Capital Destinations Trust	Wendy David	Diligent Corporation
Stacey Coleman	Franklin Templeton Investments	Lauren Davides	State Street Bank and Trust Company
John Collins	AST Fund Solutions	Theresa Davidson	Ivy Investments
Sean Collins	Investment Company Institute	Chuck Davis	SS&C Technologies
Marc Collins	RiverNorth Funds	Christopher Davis	Strategic Insight
Alan Colodner	Vertical Management Systems	Meghan Day	Diligent Corporation
Donald Colombo	Corfinancial	Francesca Day	Independent Franchise Partners
Janine Comstock	MFS Investment Management	Peter De Proft	EFAMA
Bryan Comtois	Fidelity Investments	Jon De St. Paer	Charles Schwab Investment Management, Inc.
Susan Condelli	Fidelity Corporate Actions Solutions	Donald Debolt	Confluence
Maureen Conley	Pax World Funds	Dawn Defreitas	The Vanguard Group
Ross Connell	Brown Brothers Harriman & Co.	Kelly Dehler	First Trust Funds
James Connington	Fund Intelligence	Ryan Del Giudice	Griffin Capital
Caitlin Connolly	Broadridge Financial Solutions, Inc.	Joseph Del Raso	Brinker Capital Destinations Trust
William Connolly	Putnam Investments	Bernard Delbecque	European Fund and Asset Management Association
Kelley Conway	Accenture	Shannon Delise	Thrivent Mutual Funds
Gregory Cook	J.P. Morgan Chase & Co.	Nicholas Deliso	Depository Trust & Clearing Corporation
Christopher Cooke	Linedata	Julie Dellinger	Homestead Funds
Frank Cooper	BlackRock	Anthony DelMastro	Symmetry Partners, LLC
Adam Cooper	Driehaus Capital Management	Anne DeMay	National Investment Company Service Association
Serina Copanas	T. Rowe Price	Jill Demski	Artisan Partners Limited Partnership
Jim Coppedge	Crossmark Global Investments, Inc.	Nancy Denney	Trillium Asset Management LLC
Sally Corning	Sun Mountain Capital	Michael DeNofrio	The Bank of New York Mellon
Nick Corsanico	Archer	Jeremy DePalma	Wells Fargo Funds Management, LLC
Liliane Corzo	Learning Rights	Greg DePaola	Wells Fargo Funds Management, LLC
George Costas	SS&C Technologies	John Detweiler	ParkLexington Advisors
Susan Coté	SEI Funds	Jim Devaney	PGIM Investments, LLC
Andy Cottrell	Kessler Topaz Meltzer & Check, LLP	Leonard Di Pietro	Tait, Weller & Baker LLP
Scott Couto	Columbia Threadneedle Investments	Michael Diamond	Fidelity Investments
Patricia Cox	1290 Funds / AXA	Gary DiCenzo	360 Funds
Catherine Coyne	National Quality Review	Anthony Diecidue	Wolters Kluwer Financial Services
Erika Craven	Broadridge Financial Solutions, Inc.	James Diercksen	ACA Compliance Group
Jeff Crisci	Diligent Corporation	Kyle DiGangi	AllianceBernstein L.P.
Dominic Crowe	Citi	Gerald Dillenburg	AMG Funds, LLC

Anthony DiSanzo	Strategic Insight	Paul Felsch	Edward Jones Investments
Jennifer DiValerio	Foreside Financial Group, LLC	John Ferencz	AMG Funds, LLC
Will Dolan	Fidelity Corporate Actions Solutions	Laura Ferguson	Franklin Templeton
Mary Anne Dolan	MAD Ink	Savonne Ferguson	Neuberger Berman Investment Advisers LLC
Peter Donatio	Columbia Threadneedle Investments	Brian Ferrie	Jensen Investment Management, Inc.
Bridghet Donato	Nationwide Mutual Insurance Company	Alfred Fichera	KPMG LLP
Natalie Donohue	PNC Capital Advisors, LLC	Jason Fickett	Federal Bureau of Investigation (FBI)
James Donovan	Six Circles Funds	John Fickle	Fidelity Corporate Actions Solutions
Michael Donowitz	Broadridge Financial Solutions, Inc.	Terri Fiedler	AIG Financial Distributors, Inc.
David Dooley	BrightHouse Investment Advisers, LLC	David Fietze	CGM Funds
Robert Dorsey	Ultimus Fund Solutions, LLC	Randall Fillmore	Aquila Investment Management LLC
Matt Doyle	T. Rowe Price Associates, Inc.	Michael Finck	GlobeTax
Greg Drose	UMB Fund Services, Inc.	Peter Finnerty	PricewaterhouseCoopers LLP
Ted Dryden	Thrivent Financial	Heather Fischer	Charles Schwab & Co., Inc.
Susan Dubin	Thornburg Investment Trust	Brian Fitzgerald	Brown Brothers Harriman & Co.
Jeffrey Duckworth	John Hancock Investments	Michael Fitzgerald	RSR Partners
Justin Dumke	Amaces	Jim Fitzpatrick	National Investment Company Service Association
Bruce Duncan	T. Rowe Price Funds	Martin Flanagan	Invesco Ltd.
John Durso	J.P. Morgan	Greg Fleming	SimCorp USA Inc.
Casey Dylan	Symmetry Partners, LLC	Julie Flynn	MUFG Investor Services
Martin Dziura	Investment Managers Series Trust	Jeremy Fodaski	Cerulli Associates
Rachel Eames	John Hancock Investment Management Services, LLC	Goshka Folda	Strategic Insight
Chad Earnst	PGIM	Elizabeth Forget	JPMorgan Chase
Matt Ebersbach	SS&C ALPS	Jill Forte	Thrivent Financial
Christopher Ebey	Northern Trust	Michael Foutes	State Street Corporation
William Ebsworth	Wells Fargo Funds	Wendy Fox	Ariel Investments, LLC
Carlyn Edgar	Atlantic Fund Services	Megan Frank	Allianz Global Investors
Mark Egert	J.P. Morgan Investment Management, Inc.	Allison Fraser	Compliance Solutions Strategies
Drew Elder	Janus Henderson Investors	Susan Frasu	BNY Mellon
Paul Ellenbogen	Broadridge, Inc.	Ann Frechette	BlackRock, Inc
Emily Engelman	Fannie Mae	Prabhat Friedland	ICI Mutual
Brooks Englehardt	USAA Investment Management Company	Alan Friedman	CRA International
Jim Erceg	T. Rowe Price Investment Services, Inc.	Katherine Fries	U.S. Bank Global Fund Services
Douglas Eu	Allianz Global Investors U.S. Holdings LLC	Markus Fuchs	Swiss Funds & Asset Management Association
Tony Evangelista	PricewaterhouseCoopers LLP	Louis Fugazy	SourceMedia, Inc.
Raphael Evanoff	Money Media	Paul Fulmer	USAA Investment Management Company
Mark Evans	Confluence	Melissa Gainor	US Securities and Exchange Commission
Aric Faber	SalesPage Technologies, LLC	Valentin Galardi	Argentine Mutual Fund Association
Lawrence Fahey	Eaton Vance Management	Paul Gallagher	Brown Brothers Harriman & Co.
Patricia Fallon	Financial Recovery Technologies	Brian Gallagher	Columbia Mutual Funds
Andrew Falter	NICSA	Paul Gallant	SS&C Technologies
Ken Fang	Investment Company Institute	Lisa Gallegos	Franklin Templeton Investments
Thomas Faust	Eaton Vance Corp.	Kevin Galvin	MUFG Union Bank, N.A.
Micheline Faver	Voya Funds	Satnam Gambhir	Envision Financial Systems, Inc.
Michael Fayne	Command Financial	Matt Garcia	Champlain Investment Partners, LLC
Patrick Feigley	PIMCO	Leslie Garner	Greater Cedar Rapids Community Foundation
Michaela Feld	Charles Schwab	George C. W. Gatch	J.P. Morgan Asset Management
Adam Feldstein	Strategic Insight	Mark Gaumond	First American Funds
Aaron Felmet	M&T Bank	Susan Gause	HSBC Funds and BrightHouse Funds

Martin Gawne	Ariel Investments, LLC	Robert Guarnieri	Deloitte
John Geary	Foreside	Robert Guerin	Wells Fargo Funds Management, LLC
Matt Geldhof	Citi	Mark Guterrez	CSI DMC
Jonathan Georges	Equisoft	William Hackett	Matthews International Capital Management, LLC
Mike Georgiou	PricewaterhouseCoopers LLP	Jason Hadler	U.S. Bank Global Fund Services
Bob Geppner	Franklin Templeton Distributors, Inc.	Brittany Haiser	UMB Fund Services
Charles Geremia	National Financial Services LLC	Catherine Halberstadt	Osterweis Capital Management, LLC
Carmen Germaine	Ignites	David Halligan	SalesFocus Solutions
Jon Gezotis	Citi Fund Services, Inc.	José Carlos Halpern Doherty	Associacao Brasileira das Entidades dos Mercados Financeiro e de Capitais
Sandeep Ghela	Independent Franchise Partners	Patrick Halter	Principal Global Investors, LLC
Mason Gillespie	Cerulli Associates	Elizabeth Halterman	T. Rowe Price Associates, Inc.
Shawn Gillespie	Equisoft	Theresa Hamacher	Versanture Consulting
Jack Gillis	Consumer Federation of America	Lisa Hamman	Independent Directors Council
Gerard Gilsenan	Broadridge	Mark Hancock	PNC Funds
Matthew Giordano	KPMG LLP	Marco Hanig	AQR Capital Management, LLC
Michael Giunta	Celera Systems LLC	Dave Hannibal	Duco
Kevin Gleason	Voya Funds	Kelsey Harris	FM Talent for NIH
Hannah Glover	Ignites	Gary Harris	Ultimus Fund Solutions, LLC
Jennifer Goerlich	BNY Mellon	Isaiah Harris	Wells Fargo Advantage Funds
Anne Goggin	Pax World Funds	Richard Harrison	Diligent Corporation
Tim Gokey	Broadridge Financial Solutions, Inc.	Karl Hartmann	Fundguru.com
Joel Goldberg	Stroock & Stroock & Lavan LLP	Steven Hartstein	Brighthouse Funds
Maureen Goldenberg	Diamond Hill Capital Management, Inc.	Keith Hartstein	PGIM Funds
Bruce Goldfarb	Okapi Partners LLC	Garrett Hawkins	Investment Company Institute
Richard Goldman	Harvest Edge Volatility	Christopher Hayden	Computershare / Georgeson
Rosemary Gooding	Brown Brothers Harriman & Co.	Thomas Hayden	Oakmark Mutual Funds
Lorrie Gordon	Brown Brothers Harriman & Co.	Deborah Hazell	HSBC Global Asset Management (USA) Inc.
Robert Gordon	Brown Brothers Harriman & Co.	Gerry Healy	Accenture
George Gorman	Eaton Vance Funds	Karen Heath-Wade	American Century Investments
Richard Gorman	Jackson National Asset Management LLC	Anne Hebard-Duduch	SS&C Technologies
Michael Gozzillo	Van Eck Associates Corporation	Jason Heinhorst	FUSE Research Network LLC
Kieron Gradwell	Fund Intelligence	Jane Heinrichs	Investment Company Institute
Mike Graham	Capital Research and Management Company	Nancy Heller	Schwab Funds
Steve Grande	FIS	Joseph Heller	SimCorp USA Inc.
Thomas Grande	GlobeTax	Katie Hellmann	Edward Jones Investments
Ken G.Y. Grant	Unified Series Trust	Stefanie Hempstead	International Value Advisers, LLC
Robert Grassi	JPMorgan Chase & Co.	Amy Henegan	Advisors Asset Management, Inc.
Joseph Grause	Advisers' Inner Circle Funds (SEI)	Tom Henk	PricewaterhouseCoopers LLP
Darryl Grayson	ACR Alpine Capital Research	Neil Hennessy	Hennessy Advisors, Inc.
Keely Grayson-Inman	SS&C Technologies	Ryan Henrich	The Fifth Third Bank, N.A.
Steven Graziano	Touchstone Advisors, Inc.	Cecilia Herbert	iShares Funds
Burton Greenwald	Franklin Templeton	Diana Herrmann	Aquila Investment Management LLC
Dan Greifenkamp	Brown Brothers Harriman & Co.	Kim Herrold	TD Ameritrade, Inc.
Josh Gribben	Hartford Funds	Alan Herzog	Edward Jones Investments
Linda Griego	Capital Research and Management Company	Phil Herzog	Strategic Insight
Nicole Griffin	Goodwin Procter LLP	Jon Hickey	Water Island Capital, LLC
John Griffin	PricewaterhouseCoopers LLP	Joe Higgins	Foreside Financial Group
Robert Grohowski	T. Rowe Price Associates, Inc.	Jennifer Hilgendorf	UMB Fund Services
Mick Grunewald	Ultimus Fund Solutions, LLC	Jeffrey Hilk	Diligent Corporation
James Gryglewicz	Fidelity Investments		

Eric Hill	Diligent Corporation	Charlie Johnson	The Hartford Funds
James Hillman	Value Line Funds	Katanga Johnson	Thomson Reuters
Brian Hirsch	Nationwide Funds	William Jones	Capital Group - American Funds
Fritz Hirsch	Principal Funds	Peter Jones	MFS Funds
David Hirschmann	U.S. Chamber of Commerce	Carl Josey	Fund Intelligence
Soyoung Ho	Thomson Reuters	Tom Joyce	Capital Group
Michael Hogan	Charles Schwab Investment Management, Inc.	Larry Joyce	Refinitiv
Ronald Holinsky	Lincoln Financial Group	Armin Kammel	Austrian Association of Investment Fund Management Companies
Mary Davis Holt	Flynn Heath Holt Leadership LLC	Tim Kan	Envision Financial Systems, Inc.
Lu Hong	Asset Management Association of China (AMAC)	Seohee Kang	Korea Financial Investment Association
Tiffany Hong	Franklin Templeton Investments	Wen-Tzu Kao	SITCA
Cynthia Hostetler	Invesco Funds	Sharon Karp	Touchstone Investments
Brian Hourihan	Brookfield Public Securities Group	Weston Kasper	Pacific Life Fund Advisors LLC
Edward Hrybenko	Broadridge	Lauren Kast	PNC Capital Advisors, LLC
Nellie Huang	Kiplinger's Washington Editors, Inc.	Linda Kaufmann	Tait, Weller & Baker LLP
Julie Hubbard	Brown Brothers Harriman & Co.	Scott Kaup	Dimensional Fund Advisors LP
Michael Hubbard	Principal Funds	Robert Kearney	Milestone Group
Jason Hubersberger	Edward Jones Investments	Michael Keenan	MFS Investment Management
Frankie Hughes	JPMorgan	Jay Keeshan	Management Practice Inc.
Michael Huisman	Envision Financial Systems, Inc.	Robert Keith	AllianceBernstein
Yie-Hsin Hung	New York Life Investment Management LLC	Burton Keller	Delta Data Software, Inc.
Ivy Huo	SEC	Christopher Keller	Harris Associates L.P.
Hugh Hurley	Harris Associates/Oakmark Funds	Jason Kellogg	RSM US LLP
Patrick Hurley	OppenheimerFunds, Inc.	Neil Kennedy	Compliance Solutions Strategies
Collyn Iblings	Mairs & Power, Inc.	Scott Kenyon	Toppan Merrill
Abby Ingber	J.P. Morgan Asset and Wealth Management	Susan Kerley	Mainstay Funds
Vincent Ingham	European Fund and Asset Management Association	Mike Kerrigan	Accenture
Bridget Ireland	FIS Global	Deborah Kessinger	Pear Tree Advisors, Inc.
Peter Irving	U.S. Bank Global Fund Services	Sarah Ketterer	Causeway Capital Management
Jonathan Isaac	Eaton Vance	Parag Khanna	FutureMap
Irina Issakova	TD Asset Management, Inc.	James Kimmel	Olstein Capital Management, L.P.
Tatiana Itikawa	Associacao Brasileira das Entidades dos Mercados Financeiro e de Capitais	Lancelot King	Seward & Kissel LLP
Hillary Jackson	Fund Board Views	Keitha Kinne	AMG Funds, LLC
Doug Jackson	Pacific Funds	Keith Kirk	DoubleLine Capital, LP
Josh Jacobs	J.P. Morgan	Benjamin Kirk	TD Ameritrade Clearing, Inc.
Dwight Jacobsen	Lazard Asset Management LLC	Jennifer Knapp	SEI Investment Manager Services
Timothy Jacoby	Edward Jones Money Market Fund	Stephen Kneeley	Driehaus Capital Management
Teresa Jankovic	Independent	Timothy Knierim	Morgan Stanley
Steph Jaouen-Starr	Charles Schwab Investment Management	Scot Knight	Financial Recovery Technologies LLC
Karrie Jerry	New Mountain Capital, LLC	Peter Knipe	IMST - AAM Funds
Adeel Jivraj	Ernst & Young LLP	Thomas Knipper	Ameritas Investment Partners, Inc
Kathleen Joaquin	T. Rowe Price Associates, Inc.	Francis Knox	John Hancock Financial Services, Inc.
John Johmann	BNP Paribas Securities Services	Ted Knutson	Forbes
Lou Johnson	AI Insight	Anmarie Kolinski	Harbor Capital Advisors, Inc.
Marissa Johnson	Brown Advisory LLC	Christopher Kornafel	OFI Global Asset Management, Inc.
Todd Johnson	Ernst & Young LLP	Fred Kosanovic	Broadridge
Gregory Johnson	Franklin Templeton Investments	Merrilyn Kosier	Ariel Investments, LLC
		Cleo Kotis	Tocqueville Trust
		Todd Kowalski	Morningstar, Inc.

Lee Kowarski	SS&C	Brian Macphee	John Hancock Signature Services Inc.
Paul Kraft	Deloitte & Touche LLP	Lawrence Maffia	JP Morgan ETFs
Kevin Kray	Cohen & Company	Kristi Maher	First Trust Portfolios L.P.
Sean Kreiger	Jackson Square Partners, LLC	Marc Mahon	Parnassus Investments
Claude Kremer	Arendt & Medernach	James Mahoney	Tait, Weller & Baker LLP
Steven Krichmar	Goldman Sachs Trust II	Audra Mai	Charles Schwab & Co., Inc.
Brandon Kriebel	T. Rowe Price	David Makowicz	CBRE Clarion Securities, LLC
Mary Kriegsfeld	Strategic Insight	Michael Maltby	Eagle Investment Systems LLC
Arthy Kumar	Workiva	Mark Manassee	ICON Funds
Glenn Laatsch	Morningstar, Inc.	Jane Mancini	State Street Corporation
Mac Laban	Goodwin Procter LLP	Julie Mansmann	Fund Action
Scott Ladner	Horizon Investments, LLC	George Mantice	Command Financial
Alexa Lam	ICI Global	Michelle Marciano-Johnson	Janus Henderson Investors
Rochelle Lamm	Rochelle Lamm & Associates	Stephen Marcell	Command Financial
Amy Lancellotta	Independent Directors Council	Scott Marcus	Delta Data Software, Inc.
Adam Langley	Angel Oak Capital Advisors	Frank Maresca	Broadridge Financial Solutions, Inc.
Samantha Larew	Manning & Napier Investor Services, Inc.	John Mari	CSIM
Igor Lasun	UBS Asset Management	Allison Marneris	Morningstar Investment Management LLC
Colleen Lavery	Eaton Vance	Michele Martin	Brown Brothers Harriman
Drew Lawton	Blackrock iShares Trust	Jay Martin	Citigroup Inc.
Polly Lebaron	National Quality Review	Samuel Martin	Corfinancial
Todd Lee	Matthews Asia	George Martinez	BNP Paribas
Randy Legg	OppenheimerFunds	Teresa Mason	AXA Equitable
John Lehner	State Street Corporation	Dennis Mason	Forum Funds
Thomas Lemke	JP Morgan Exchange-Traded Fund Trust and SEI Funds	W. Edward Massey	Lieff Cabraser Heimann & Bernstein LLP
Russell Lemley	American Funds	Jennifer Mastronardi	AXA Equitable Funds Management Group, LLC
Andrea Lennon	FundRock Management Company S.A.	Teresa Matter	Deloitte Tax LLP
David Levin	AXA-Equitable	Jennifer Matthews	Lincoln Financial Group
Lawrence Levine	MFS Investment Management	Robert Matthews	T. Rowe Price
Brian Lewbart	T. Rowe Price Associates, Inc.	Jeremy May	ALPS Advisors, Inc.
Michael Liberatore	Broadridge Financial Solutions, Inc.	Ruth Mayr	U.S. Bancorp Asset Management, Inc.
Randy Linscott	M3Sixty Administration, LLC	Jocelyn McBride	Computershare Fund Services, Inc.
Jay Lipman	The Bank of New York Mellon	Michael McBrinn	Wolters Kluwer Financial Services
Susan Livingston	Brown Brothers Harriman & Co.	Peggy McCaffrey	Cohen & Company, Ltd.
Sally Loane	Financial Services Council (Australia)	Erin McClafferty	BBD, LLP
Bruce Long	Baillie Gifford overseas Funds	Michael McDonald	Brown Brothers Harriman
David Long	Edward Jones Investments	Melissa McDonough	Brown Brothers Harriman & Co.
Patricia Louie	Oakmark Funds	Bruce McDougal	Charles Schwab Investment Management
Ed Louis	Cerulli Associates	Jeff McGuire	Strategic Insight
Lizzie Lowe	PGIM	Joelle Mckay	J.P. Morgan Asset Management
Matthew Lubben	T. Rowe Price Associates, Inc.	Trevor McLeod	T. Rowe Price
Reese Lucas	FundGuard	Paul McMillan	Fund Intelligence
Michael Luzzatto	First Eagle Investment Management, LLC	Rachel McNabb	Cornerstone Advisors, Inc.
Carol Lynde	Bridgehouse Asset Managers	James McNamara	Goldman Sachs Mutual Funds
Brenda Lyons	State Street Bank and Trust Company	Mike McNamee	Investment Company Institute
Shawn Lytle	Macquarie Investment Management	Mike McNeill	SS&C Technologies
Joseph Maccone	AMG Funds, LLC	Shawn McNinch	Brown Brothers Harriman & Co.
Lonnie Macdonald	Vestmark	William McVay	AdvisorShares
Scott Mackey	RSM US LLP		

Kevin Meagher	Fidelity Management & Research Company	Paul O'Brien	Aquila Group of Funds
Sharon Meers	Capital Research and Management Company	Kelli O'Brien	Citi Fund Services
Karla Mejia-Hatcher	Ariel Investments, LLC	Barry O'Connor	Bank of New York Mellon
Carlos Melville	Columbia Threadneedle Investments	Bernie O'Connor	SS&C Technologies, LLC
Terry Metzger	SS&C Technologies	David Oestreicher	T. Rowe Price Associates, Inc.
Matthew Michaud	GlobeTax	Glenn O'Flaherty	Aquila Funds
Pascal Millaire	Capital Research and Management Company	Ronald O'Hanley	State Street Corporation
Jamie Miller	Freddie Mac	Drew O'Hearn	Cerulli Associates
John Miller	J.P. Morgan	Alireza Olia	GW Law
Stephanie Milner	Fannie Mae	Erik Olsen	ACA Compliance Group
Eruch Mody	Brown Brothers Harriman & Co.	Erik Olsen	Northern Trust Mutual Funds
Dan Mohrbacher	RSM US LLP	Janet Olsen	PPM Funds
Iris Mojica	AIG Funds	Susan Olson	Investment Company Institute
Jane Moncreiff	Schwab	Lori Olson	Ivy Funds
Jason Moore	Brinker Capital Destinations Trust	Susan Olson	Natixis Investment Managers
Brian Moran	AMG Funds, LLC	Michael O'Mealey	PricingDirect, Inc.
Pete Moran	SEI	Lisa O'Neill	Depository Trust & Clearing Corporation
Tom Morelli	T. Rowe Price	Tom Oprendeck	SalesFocus Solutions
Sandra Morris	J.P. Morgan Chase & Co.	Michael Oroszi	T. Rowe Price Group, Inc.
Bruce Morris	Tabb Group	Stephanie Ortals-Tibbs	Investment Company Institute
George Morriss	Neuberger Berman Mutual Funds	Robert Ortense	Broadridge Financial Solutions, Inc.
Leeza Moser	DFIN	Henry Orvin	SEI
Todd Moyer	Confluence	Don Osmani	New York Life Investment Management LLC
Carleton Muench	Pacific Life Fund Advisors LLC	Andrew Owen	Wells Fargo Funds Management, LLC
William Muia	HSBC Securities Services	Joanne Pace	OppenheimerFunds
Simon Mulcahy	Salesforce	Sharon Pacheco	Pacific Life Insurance Company
Peter Muldoon	Temenos	Steven Paggioli	AMG Funds and Professionally Managed Portfolios
Andi Mullins	Valued Advisers Trust	Anthony Palermo	American Funds
Stephen Murphy	Cohen & Steers	Scott Palmer	ParkLexington
Jennifer Muzerall	Brown Brothers Harriman & Co.	Joseph Palombo	RSM US LLP
Avi Nachmany	Avi Nachmany Consulting	Thomas Pandick	Tocqueville Asset Management L.P.
Fred Naddaff	Symmetry Panoramic Trust	Erika Panyard	U.S. Bank Global Fund Services
Shelly Nahrstedt	PNC Capital Advisors, LLC	Joseph Paolo	AXA Equitable Life Insurance Company
Swenitha Nalli	ICI Mutual Insurance Co.	Irene Papadoulis	Dreyfus Transfer, Inc.
Diane Napolitano	New York Life Investments	James Pappas	ACA Compliance Group
Stephen Nazzaro	MUFG Union Bank, N.A.	Steve Papulak	SEI
Gene L. Needles, Jr	Resolute Investment Managers	Ashi Parikh	PNC Mutual Funds
Barbara Nelligan	The Northern Trust Investments, Inc.	Stuart Parker	PGIM Investments
Erin Nelson	ALPS Advisors, Inc.	Ronald Parker	PIMCO Funds
Mark Nerud	Jackson National Asset Management LLC	Brian Parris	Homestead Funds, Inc.
Joseph Neuberger	U.S. Bank Global Fund Services	Randy Pattiselanno	Dufas
Catherine Newell	Dimensional Fund Advisors LP	Vinita Paul	Heartland Group
Damian Neylin	PwC	Monique Pecchia	Russell Investments
Greg Niland	Capital Research and Management Company	Michael Peck	U.S. Bank Global Fund Services
Teresa Nilsen	Hennessy Advisors, Inc.	Alice Pellegrino	The Hartford Funds
Catherine Nitschke	JPMorgan Chase Bank, N.A.	George Pereira	Charles Schwab Investment Management, Inc.
Jackie Noblett	IGNITES	Scott Perkins	Computershare Fund Services, Inc.
Jim Nolan	Citigroup Global Markets Inc.	James Perna	Homestead Funds
Anna Nordseth	Morningstar, Inc.	Robin Pertusi	Allianz Global Investors U.S. Holdings LLC
John Oakes	RiverNorth		

Brian Petersen	OppenheimerFunds, Inc.	Kirk Reid	OppenheimerFunds
Craig Pfeiffer	The Money Management Institute	Brian Reid	PGIM Investments
Christopher Pfeiffer	Allianz Investment Management, LLC	Debra Reilly	Computershare Fund Services, Inc.
Kevin Phelan	BNY Mellon Dreyfus	Patrick Reilly	FactSet Research Systems
Justine Phoenix	NICSA	Neill Reilly	SS&C Technologies, LLC
Greg Piasecky	SalesPage	Katherine Reimann	Foreside Financial Group
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Paulita Pike	Ropes & Gray LLP	Christopher Rhodes	Edward Jones Investments
Anna Pilosova	OppenheimerFunds, Inc.	Karen Richards	First Pacific Advisors, LP
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Betsy Piper Bach	AdvisorShares	David Riley	Delta Data
Brian Pittluck	PIMCO LLC	Susan Ringoen	Nuveen
Jed Plafker	Franklin Templeton Investments	Bob Rinicella	SEI
Cynthia Plouché	Northern Funds and Baring Funds	Donald Roberson	ProShares
Dana Pointer	Preserver Partners, LLC	Stephanie Rocco	BKD, LLP
Cliff Poirier	Fidelity Investments	Andrew Rodriguez	Compliance Solutions Strategies
Manoj (Tito) Pombra	Compliance Consultant	Maryanne Roepke	MFS Mutual Funds
Herbert Poon	Capital Research and Management Company	Randi Roessler	Davis Selected Advisers, L.P.
Ori Porat	Fiducia Optime	Noah Rogers	Donnelley Financial Solutions, Inc.
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Mindy Posoff	Oakmark Funds	William Rosensweig	Brown Brothers Harriman & Co.
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Katherine Primas	Dodge & Cox	Gabriel Rubin	The Wall Street Journal
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Allan Reich	Oakmark Funds	Brian Schappert	American Century Investment Management, Inc.

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Kyle Schmiegel	Charles Schwab & Co., Inc.	Erik Skulte	eSecLending
Philip Schneider	Bank of New York Mellon	Kristi Slavin	Brighthouse Investment Advisers, LLC
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Erik Sirri	Natixis Funds, Loomis Sayles Funds, and Natixis ETFs	Peter Sundman	Diamond Hill Funds
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Peggy Wong	Baron Capital, Inc.	William Yung	FundGuard
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Aaron Wong	SalesFocus Solutions	John Zader	Investment Managers Series Trust
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Rana Wright	Harris Associates	Cindy Zarker	FUSE Research Network LLC
Chen-Fang Wu	SITCA	Yaniv Zecharya	FundGuard
Gladys Xiques	TCW Investment Management Company	Dan Zemanek	Driehaus Mutual Funds
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