

# 2017 Tax and Accounting Conference

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## Attendee List: Sorted by Company

Panayiotis Andreou	1199SEIU Funds
James Raymond	AB
Eric Olsen	Aberdeen Asset Management
Mike Kerrigan	Accenture
Fred Kosanovic	Access Data, a Broadridge Company
Brian Hook	Adams Funds
Phyllis Clarke	AllianceBernstein
Sean McLean	ALPS Fund Services
Yelena Kalmykov	ALPS Fund Services, Inc.
Mike Wenger	ALPS Mutual Fund Services, Inc.
Clay Bell	American Beacon Advisors
Shelley Dyson	American Beacon Advisors
Sonia Bates	American Beacon Advisors, Inc.
Melinda Heika	American Beacon Advisors, Inc.
Michael Degen	American Century Investments
Heather Hassett	American Century Investments
Mike Horn	Ameriprise Financial, Inc.
John Starace	AMG Funds
Mark Bradley	Amundi Pioneer Asset Management
Gregory McNeil	AQR Capital Management LLC
Melissa Schlisman	AQR Capital Management LLC
Tara Bongiorno	AQR Capital Management LLC
Heather Bonner	AQR Capital Management LLC
Joseph Dimaggio	Aquila Investment Mgmt. LLC
James Rooney	Ariel Investments
Katie Jones	ArrowMark Partners
Robin Rettschlag	Artisan Partners
Blake Rigel	Artisan Partners
Chris Tsutsui	Ashmore
Frank Maresca	AST Fund Solutions, LLC
Karen Shaw	Atlantic Fund Services
Greg Surette	Atlantic Fund Services
Uljana Molitor-March	Atoz
Michelle Gallo	AXA
Roselle Ibanga	AXA Equitable Funds Management Group
Lindsay Cockburn	Baillie Gifford
Lisa Lapsley	Baillie Gifford
Robert Gaffney	Baron Capital
Peggy Wong	Baron Funds
Gregory Kieselowsky	BBD, LLP
James Kaiser	BBD, LLP
Jesse Lagrossa	BBD, LLP

Rajesh Misra	BBD, LLP
Matthew Romano	BBD, LLP
Cory Stewart	BBD, LLP
Diane Osborne	BBH
Charles Schreiber	BBH Trust
Ronald Fisher	BlackRock
Linda Novak	BlackRock
Charles Pulsfort	BlackRock
Boyd Wilson	BMC Fund, Inc.
Timothy Bonin	BMO Funds, Inc.
George Martinez	BNP Paribas
Brian Curran	BNY Mellon
Jennifer Goerlich	BNY Mellon
Lia Koopman	BNY Mellon
Christopher Lacey	BNY Mellon
Gregg Manning	BNY Mellon
Victoria McGowan	BNY Mellon
William McManus	BNY Mellon
Alexander Ramos	BNY Mellon
Chris Richmond	BNY Mellon
Alan Rubinstein	BNY Mellon
Gary Iwamura	Brandes Investment Partners, L.P.
Nathan Proulx	Brandywine Global Investment Management
Deborah Hanna	Bridgeway Funds
Sanjeev Doss	Brighthouse Financial
Adnani Johari	Brighthouse Financial
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Mohamed Rasul	Brookfield Investment Management Inc.
Kevin Bengtson	Brown Brothers Harriman
Timothy Bosco	Brown Brothers Harriman
Ross Connell	Brown Brothers Harriman
Vanessa Cuzzo	Brown Brothers Harriman
Brian Fitzgerald	Brown Brothers Harriman
Julie Flynn	Brown Brothers Harriman
Scott Huebl	Brown Brothers Harriman
Jim Lacasse	Brown Brothers Harriman
Jonathan Mack	Brown Brothers Harriman
Melissa McDonough	Brown Brothers Harriman
Joe Pennini	Brown Brothers Harriman
Traci Presley	Brown Brothers Harriman
Michael Saunders	Brown Brothers Harriman
Lisa Snider	Brown Brothers Harriman

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David Mangefrida	Calamos Investments
Sandra Chuon	Capital Group
Brian Janssen	Capital Group
Dori Laskin	Capital Group
Greg Niland	Capital Group
Deidra Hewardt	Capital Growth Management
Neal Berkowitz	CBIS
Ron Casciello	CBRE Clarion Securities LLC
John Welsh	CBRE Clarion Securities LLC
Jeremy Sloane	CBRE Clarion Securities, LLC
Jem Hudgins	CGM Funds
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James Pierce	Charles Schwab Investment Management
Dana Smith	Charles Schwab Investment Management
Brian Szilagyi	Charles Schwab Investment Management
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Jim Keenan	Citi
Jim Nolan	Citi
John O'connor	Citi
Allan Shaer	Citi Fund Services
Robert Darmanin	Citibank NA
David Rumph	Clarkston Capital
Kent Crittenden	CNL Financial Group
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Peggy McCaffrey	Cohen & Company
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Melissa Elfstrom	Columbia Threadneedle Investments
Nancy Mah	Columbia Threadneedle Investments
Julian Quero	Columbia Threadneedle Investments
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Michael Townson	Command Financial
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Mark Evans	Confluence
Kelli Geyer	Confluence
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David Moore	Confluence
Todd Moyer	Confluence

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Gavin Bullock	Deloitte
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Kenneth Kess	Deloitte
Susan Klink	Deloitte
Dmitriy Koza	Deloitte
Paul Kraft	Deloitte
Paul Li	Deloitte
Mark Melito	Deloitte
Daniel Rooney	Deloitte
Vishal Shah	Deloitte
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Kelly McGovern	Deloitte & Touche LLP
Jason Greenlee	Deloitte & Touche LLP
Stacey Wilson	Deloitte & Touche LLP
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Nicole Crowley	Deloitte Tax LLP
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Allie Hanson	Deloitte Tax LLP
Zhuan Qi Lee	Deloitte Tax LLP
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Gregory Hinkle	Dimensional Fund Advisors
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Peter Bush	Ernst & Young
Adeel Jivraj	Ernst & Young
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Amy McDonald	Fidelity Investments
David Morris	Fidelity Investments
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Megan Baker	First Trust Advisors
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John Rockenstein	First Trust Advisors L.P.
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Mark Osterheld	HVIT Funds
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Catherine Nitschke	J.P. Morgan
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Eric Bjornson	Jackson National Asset Management
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Deirdre Fortune	KPMG LLP
Cindi Fuller	KPMG LLP
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Steven Buller	MFS Mutual Funds
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Kerry Thiede	Northern Trust
Ofelia Potter	Northern Trust Company
Kevin Bath	Northwestern Mutual
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Scott Meissner	Nuveen
Gina Spunder	Nuveen
Stephen Foy	Nuveen Investments
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Philip Kerfs	OECD
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Sarah Norman	Olive Street Investment Advisers, LLC
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John Morano	PricewaterhouseCoopers LLP
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Edward Sloyer	PricewaterhouseCoopers LLP
Jonathan Uva	PricewaterhouseCoopers LLP
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Jason Boyce	PwC
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Nicole Culp	PwC
Michael Dasilva	PwC
Kit Dickson	PwC
Charles Digisi	PwC
Brian Donahue	PwC
Paul Fisher	PwC
Jennifer Ford	PwC
Kevin Frank	PwC
Jonathan Franke	PwC
Kevin Freitas	PwC
Nancy Gogan	PwC
Kathryn Gonner	PwC
Pam Gordon	PwC
Reilly Grellas	PwC
Rusty Helton	PwC
Thomas Higgins	PwC
Miguel Hipolito	PwC
Tracee Jones	PwC
Tracey Keevan	PwC
Katie Knapp	PwC
Edward Ledoux	PwC
Rebecca Lee	PwC
Lisa Long	PwC
Lindsey Long	PwC
Mindi Lowy	PwC
Tom Lyons	PwC
Simbarashe Machona	PwC
Melissa Maher	PwC
Christopher May	PwC
Patrick McConnell	PwC
Megan McCurdy	PwC
Peter McNamara	PwC
Olga Mitnik	PwC
John Moore	PwC
Mike O'Connor	PwC
Jeffrey Peloquin	PwC
Stephen Perazzoli	PwC
Robert Prado	PwC

Daniel Puts	PwC
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Jacob Rose	PwC
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Aaron Schwartz	PwC
Joseph Schwarz	PwC
Jacob Smith	PwC
Tina Smolarz	PwC
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Chad Tallant	PwC
Taishiro Tezuka	PwC
Will Tipton	PwC
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Franziska Hertel	Ropes & Gray LLP
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Wendy Boneau	RSM US LLP
Jason Kellogg	RSM US LLP
Candace Mantelli	RSM US LLP
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Kyle Smith	State Street
Kyle Hubbard	State Street Bank
Brett Fernquist	State Street Bank and Trust
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Susan Feit	State Street Corporation
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Paul Krug	T. Rowe Price
Tony Lam	T. Rowe Price
James Lorden	T. Rowe Price
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Leonard Di Pietro	Tait Weller
Linda Kaufmann	Tait Weller
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Sarah Bergstrom	Thrivent Financial
Ryan Burnett	Thrivent Mutual Funds
Mary Xiong	Thrivent Mutual Funds
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Eric Vanandel	U.S. Bancorp Fund Services, LLC
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Alison Staloch	U.S. Securities and Exchange Commission
Mick Grunewald	Ultimus Fund Solutions
Brian Lutes	Ultimus Fund Solutions, LLC
Leo Payne	Ultimus Fund Solutions, LLC
Robert Dorsey	Ultimus Managers Trust
Michael Yanke	UMB Fund Services
Bruce Little	UMB Fund Services, Inc.
Linda Carlisle	Unicom Capital
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Sue Scheel	USBank
James Parker	Van Eck
John Crimmins	Van Eck Associates Corporation
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Thomas Higgins	Vanguard
Ryan Lovin	Vanguard
Deborah Perch	Vanguard
Daryl Vansyckle	Vanguard
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Amy Hackett	Virtus Investment Partners
Craig Wheeler	Voya Investment Management
Jason Kadavy	Voya Investments LLC
Todd Modic	Voya Investment Management
Louis Anderson	Vulcan Value Partners
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Dave Hall	Waddell and Reed
Mark Woodworth	Waddell and Reed / Ivy
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Chris Mancini	Workiva
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Tracy Bonin	
Rachel Brady	
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Frank Carr	
Paul Casares	
Christopher Chiusolo	
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Tracy Hans	
Sharon Higgins	
Linda Hill	
Dale Huizenga	
Deirdre Johari	
Dennis Kane	
Ernie Lang	
Danielle Laythrop	

Tara Masek
Lauren May
Erin McClafferty
Maureen McKenna
Lisa McManus
Samantha Meissner
Mitsue Nakashima
Gregory Nelson
Kristen Nerud
Marytheresa O'connor
Elisa O'keefe
Danil Ponomarev
Ray Schmitt
Robert Schwaba
Henry Seduski
Donna Shaw
Wendy Smith
Linda Strano
Stephanie Tanguay
Julie Tedeschi
Paul Torre
Liza Villarreal
Randi Welch
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