Board of Governors Directory

May 2026

MONEY
MANAGEMENT
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Officers



Jim Devaney, Chair

PGIM

Head of U.S. Distribution

Mr. Devaney has over 25 years of experience in the financial services industry. In his current position, he is responsible for the PGIM Investments sales, retirement and national account teams. PGIM Investments is a manufacturer and distributor of retail products globally for PGIM, the global investment management business of Prudential Financial, Inc., which encompasses PGIM Funds. Earlier, he spent 11 years at Columbia Funds. He began his career at John Nuveen and Company, where he spent six years as a mutual fund wholesaler. Mr. Devaney, who currently serves on the MMI Board of Governors, earned a BA in economics and political science from Villanova University.



Brad Jung, Chair-Elect

Russell Investments

Head of North America, Advisor and Intermediary Solutions

Mr. Jung, who joined Russell Investments in 2004, leads the business unit focused on developing and executing strategies for Russell Investments' advisor partnerships, along with the firm's client relationships in the wealth management and retirement channels. He is a member of Russell Investments' global executive committee, reporting directly to CEO Michelle Seitz, and is based in Seattle. Prior to his current position, Mr. Jung was the managing director of national sales with responsibilities that included the management of Russell Investments' nationwide sales and service teams as well as establishing distribution relationships and the management of sales and service strategies with intermediaries in the brokerage, bank, RIA custodian and record keeper markets. Before joining Russell Investments, Mr. Jung worked at Strong Capital Management, where he held several positions including vice president of regional sales and director of intermediary sales. In 1993, he started his career as a life insurance agent and investment specialist for Northwestern Mutual. Mr. Jung earned a BBA in finance and business law from the University of Wisconsin – Whitewater – and an MBA from the University of Wisconsin – Milwaukee. He holds the Certified Investment Management Analyst, Chartered Private Wealth Advisor and Accredited Investment Fiduciary designations.

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Kyle Thompson, Treasurer

Voya Investment Management

Senior Vice President, Strategic Relationships Manager

Kyle Thompson is a senior vice president, relationships manager at Voya Investment Management. In his role, he leads strategic relationships for Voya's wire channels. Prior to joining Voya, Kyle held multiple positions with Scottrade Financial Services, providing guidance to individuals and institutions. Kyle earned an MBA in finance from Quinnipiac University and a BA in economics from the University of Connecticut. He also holds FINRA Series 7, 63 and 65 licenses.

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Annie Brown, Secretary

T. Rowe Price

Co-Head, Wealth Management, U.S. Intermediaries

Ms. Brown is a member of the boards of T. Rowe Price Group, Inc., T. Rowe Price Investment Services, Inc., and T. Rowe Price Associates, Inc. She also serves on the board for Port Discovery in Baltimore, Maryland, and is a member of the board of the Investment Management Education Alliance. Ms. Brown has been with T. Rowe Price since 1993, and, during her tenure, she has been an institutional retirement sales manager for several U.S. regions, the head of the institutional consulting team in the broker-dealer segment, the head of national accounts in the broker-dealer segment, and, most recently, the head of all broker-dealer activity. In her current role, she and her team are responsible for leading the strategy for national accounts across broker-dealers, global banks, and clearing firms. Ms. Brown earned a BS, cum laude, in economics from the University of Delaware. She holds FINRA Series 24, 7, 63, and 3 registered representative licenses.

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Brendan Clark, Chair Emeritus

Clark Capital Management Group

Chief Executive Officer

As his firm's leader in defining and executing its vision and strategy, Mr. Clark is tasked with aligning Clark Capital's mission with stakeholder needs. He oversees all the firm's business lines, including custom-tailored strategies for high-net-worth investors, '40 Act products, strategist model delivery, and strategic partnerships. Mr. Clark leads an experienced team of executives who ensure that Clark Capital maintains its consistent, firm-wide focus on delivering world-class asset management strategies and services to advisors and their clients. He has been with Clark Capital since 2001 and has held positions of increasing responsibility including executive vice president of business development and president. Mr. Clark serves on MMI's Board of Governors and the MMI Gateway Foundation's Board of Trustees. The Gateway Foundation supports a variety of programs to foster career awareness and workforce readiness for students of color from historically underrepresented communities seeking internships and entry-level employment opportunities in the financial services industry. He is also a founding member and treasurer of the board of Philadelphia Financial Scholars, a 501(c)(3) nonprofit that aims to help Philadelphia high school students and their families take on systemic challenges and develop wealth-building tools through access to financial literacy and entrepreneurship education. Mr. Clark earned a BS in economics from the University of Delaware and holds the Chartered Financial Analyst designation. He is a member of the CFA Institute and the CFA Society of Philadelphia.

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Craig Pfeiffer

Money Management Institute

President and Chief Executive Officer

Mr. Pfeiffer, a proven senior financial services executive with 40 years of industry experience, became president and chief executive officer of the Money Management Institute in 2015. MMI is the leading voice for the global financial services organizations that provide advice and professionally-managed investment solutions to individual and institutional investors. Additionally, Mr. Pfeiffer is engaged in leadership roles across the financial services landscape. He is active as: co-founder and chair of the advisory board for RiskBridge Advisors, an OCIO asset manager focused in the non-profit, endowments and foundations space; a board director and lead director for Westfield Group's Ohio Farmers Insurance Company; and an operating partner at the private equity firm Corsair Capital. Following 29 years with Morgan Stanley Smith Barney and its predecessor firms, Mr. Pfeiffer transitioned from MSSB in 2012, where he was vice chairman and a member of the firm's executive committee. From 2003 to 2011, Mr. Pfeiffer held a progression of senior positions including the national sales group with responsibility for marketing strategy and client communications, desktop technology, and brokerage-based banking. Additionally, he was responsible for businesses including retirement services and corporate equity solutions. From 1982 to 2003, Mr. Pfeiffer advanced through field management roles, starting as a financial advisor, and transitioning into field management at all levels. He is an alumnus of Indiana University Kelley School of Business.

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Executive Committee



David Giffen

UBS

Managing Director

Mr. Giffen, who joined UBS in 2006 as a product manager in the institutional consulting group, serves as a member of the Advisory and Planning Products Management Team in the Americas with direct responsibility for leading the U.S. Investment Advisory and Investment Products businesses. In 2010, he left the Institutional Consulting Group to join the Advisory Solutions team and run the separately managed accounts business. After serving in various product management positions, Mr. Giffen briefly led the UBS investment manager analysis team before he assumed his current role, which includes responsibility for the firm's UBS Advice, FA-managed, and 3rd-party managed offerings. He has been a key leader and contributor to the success of many strategic initiatives including the SMA Advantage Program, the firm's unified managed accounts business, and Advice Advantage, the firm's first digital advice offering in the U.S. market. Mr. Giffen holds an MBA in business administration from Fairleigh Dickenson University.

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Tim Kresl

Broadridge

Managing Principal, Head of U.S. Client Success

Mr. Kresl has spent his career partnering with leading financial services providers to help translate data and research into meaningful actions that improve business outcomes. He co-founded Atom Analytics in January 2018 with the goal of helping financial services providers use their existing data more effectively and systematically to drive distribution effectiveness. In July 2018, Atom Analytics joined Broadridge as part of the data and analytics group. Broadridge's new Distribution Insight Team now combines in-depth interviews with key stakeholders, an unmatched distribution dataset, cutting-edge data science techniques, and the team's unique view of the customer landscape with clients' business goals and data to create bespoke segmentation strategies and client journey maps. Prior to starting Atom Analytics, Mr. Kresl was a principal of Market Metrics and subsequently a strategic advisor to Strategic Insight. In these roles, he became a recognized leader in the industry for utilizing data to drive distribution effectiveness. He has worked with a range of asset managers to design sales territories, develop optimal rotations, implement data-based solutions, and train end users to drive adoption. In addition, Tim has worked extensively with senior managers to develop management tools that measure the effectiveness, productivity, and improvement of their distribution organizations. Mr. Kresl completed his undergraduate studies at the University of Vermont, graduating with a BS in business administration and a BA in sociology.

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Jay Link

Bank of America Merrill Lynch

Managing Director, Head of Fiduciary Programs and Platforms

Mr. Link is responsible for product and business strategy, platform development, user experience, channel management, and ongoing fiduciary oversight of his firm's discretionary and non-discretionary investment advisory offerings, including the Investment Advisory Program (Merrill Lynch One). Prior to joining Merrill Lynch in 2010, he was a managing director and senior relationship manager with J.P. Morgan Asset Management, responsible for enterprise distribution relationships with some of the firm's largest intermediary clients. Before J.P. Morgan, Mr. Link was with Morgan Stanley, serving in a variety of senior leadership positions in the global wealth management group. Most recently, he was managing director and product director for the Consulting Services Group (CSG). In this role, he was responsible for strategy and leadership of all advisory platforms. He was also a member of the CSG due diligence committee and co-chair of the institutional separately managed accounts referral committee. Mr. Link earned a B.S. in financial management from Clemson University. He holds the CIMA designation from the Investments & Wealth Institute, is an active member of MMI, and co-founded the SIFMA Managed Accounts Roundtable. He also serves on the board of trustees at the Basking Ridge Presbyterian Church.

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Cheryl Nash

InvestCloud

President, APL

With over 35 years of experience, Ms. Nash has deep expertise and understanding of industry trends, priorities and challenges and is a highly sought-after subject matter expert. Her consultative approach has yielded enduring client partnerships and relationships. Her credentials include being president of Fiserv Investment Services for 12 years, CEO of Tegra118 and InvestCloud Financial Supermarket for three- and one-half years, and chief customer executive at InvestCloud for one year. She serves on the MMI Board of Governors and was Co-Chair of the MMI DE&I Community. As a former Envestnet Institute on Campus advisory board member, she founded and led the Women in Wealth Management initiative, an award-winning program dedicated to inspiring, advising, and educating career-focused women. She is also on the Females and Finance Advisory Board and on the board of Asset Map and Snappy Kracken. Ms. Nash has received numerous awards for her contributions, advocacy and achievements including: the MMI Pioneer Award (2009); Stevie Gold Award for Women in Business (2016); Family Wealth Report's Women in Wealth Management—Individual Contributor award (2017); MMI/Barron's Industry award to Envestnet Institute on Campus in the 'Doing Good' category, a program for which Ms. Nash was a key contributor (2017, 2018); InvestmentNews Women to Watch honoree (2017); the FTF News 2018 Editor's Choice Award; ThinkAdvisor's 2019 Top Women in WealthTech; Savvy Ladies 2019 Change Maker of the Year; Stevie 2020 Bronze Award for Women-Run Workplace of the Year; Markets Choice Awards Women in Finance 2020 CEO of the Year; and 2023 Women in Wealth Management Award for Career Excellence, and 2024 Women in WealthTech to Watch F2 award.

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Governors



Sarah Bauer

Envestnet

Head of Asset Management Engagement

Ms. Bauer plays a pivotal role in overseeing all asset manager relationships and the placement of asset management products on the Envestnet platform. In this position, she leads collaborative efforts across various areas of Envestnet to deliver impactful go-to-market strategies that nurture asset manager partnerships. With a career spanning nearly two decades in the financial industry, Ms. Bauer has held various roles that showcase her leadership and strategic acumen. Most recently at Envestnet, she was a co-head of the strategic relationship management team, working closely with the firm's top enterprises to enhance their platform offerings utilizing Envestnet's expansive solution set and aligning strategies to help them achieve growth. Earlier, she led the solutions distribution team and PMC national accounts. Before joining Envestnet, Ms. Bauer dedicated 15 years to Symmetry Partners, where she held leadership positions in distribution and marketing. During her tenure at Symmetry, as a member of the firm's executive committee, she played a key role in reshaping and expanding its national accounts team, demonstrating her expertise in building and managing high-performing teams. Ms. Bauer's extensive experience, passion for the financial industry, and commitment to excellence have combined to make her a dynamic and collaborative leader in the asset management space.

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Cheri Belski

LPL Financial

EVP, Head of Investment Management Solutions

In her position, Ms. Belski sets the direction and strategy for key investment efforts for LPL Financial, including research, investment products, strategic partnerships, annuities, advisory platforms, and retirement partners business. Earlier, she held multiple strategic leadership roles across operations, sales and distribution and global product during her more than 20-year career at T. Rowe Price. Her diverse background — spanning sales, product, client service, distribution, and operations — is pivotal in transforming LPL's investment portfolio and driving innovative solutions that meet the evolving needs of its clients, ensuring sustained growth. Ms. Belski received a BA in political science and Latin American studies from the University of Pittsburgh, earned an MBA in international business from Johns Hopkins Carey Business School, and holds FINRA licenses 3, 6, 63, 7, 24, and 53.

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Nicole Bjugan

Ameriprise Financial Services

Vice President, Wealth Management Solutions, Product & Platform Solutions Management

Ms. Bjugan heads her the firm's advisory product and platform solutions, including Rep as Advisor, Rep as PM, SMAs, UMAs, and Mutual Fund Advisory. In this role, she oversees model management, product expansion, key partner and vendor relationships, product fees, related compensation structures, and advisor product support, as well as audits and business results reporting. She is a key member of the Ameriprise managed account oversight product committee, contributing to the firm's investment oversight and governance. Prior to her current role, Ms. Bjugan served as senior director of brokerage product management and business analytics. In that position, she was responsible for product strategy and management of the Ameriprise cash management account, brokerage account fee structures, and firmwide business reporting and analytics. Ms. Bjugan, who holds FINRA Series 7 and 24 licenses, has been with Ameriprise since 1996, bringing nearly three decades of deep industry experience and leadership to her work.

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Doug Brigman

Raymond James Financial

President, Asset Management Services

Mr. Brigman, who joined Raymond James Financial in 2008, is focused on delivering top-tier investment solutions and services to financial advisors. Prior to his current position, he served as president of Raymond James Insurance Group, where he managed a team of nearly 200 financial specialists with strong technical expertise. He also held the roles of: Tampa Bay Complex Manager for Raymond James & Associates, where he was recognized as the firm's "Complex Manager of the Year" in 2020; head of fiduciary services, where he focused on leading the firm's response to the DOL's fiduciary rule; and head of the planning and strategy division for the firm's private client group. Mr. Brigman initially joined Raymond James in 2008 as vice president of cash and lending solutions, where he led the business case and build-out of the firm's securities-based line of credit product. Before joining Raymond James, he spent time at Progressive Insurance and BellSouth Telecommunications. Mr. Brigman earned an MBA at the University of Virginia's Darden School of Business, holds a BS in industrial engineering from the University of Florida, and is a Certified Financial Planner.

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Suzanne Casey

Northern Trust Asset Management

Senior Vice President, Head of Wealth Client Group

Ms. Casey serves on the Asset Management Executive Group with oversight of the NT Wealth and Intermediary Wealth client segment. She is responsible for strengthening her firm's presence in the Northern Trust and Third-Party Wealth management markets and delivering an exceptional client experience to all wealth clientele. During her more than 30 years of experience across the wealth management and investment management industries, she served as managing director, head of sales and distribution at Hilton Capital Management, LLC and held a variety of senior sales and leadership roles at such financial service firms as Vanguard and J.P. Morgan Asset Management. Earlier, she was national sales manager and co-head of the wealth solutions specialist organization at Merrill Lynch & Co. Before that, she worked at Goldman Sachs Asset Management, where she was part of their third-party distribution build-out, running the sales desk and covering major metro markets. She began her career as an internal wholesaler at Van Kampen American Capital. Ms. Casey has a BA from the University of Vermont. She holds FINRA Series 6, 7, 24, 63 and 66 licenses. She currently volunteers as an instructor for the organization Rock the Street, Wall Street which aims to empower young girls through education by strengthening their financial literacy and knowledge of the financial services industry. She is a member of the Board of Governors for MMI, a member of the Sales & Marketing Subcommittee for the Investment Company Institute and serves on the Board of Trustees for the Gateway Foundation.

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David Chorba

Nomura Asset Management

Managing Director, National Sales Manager

Mr. Chorba manages a team of 36 external wholesalers covering the retail channel and five senior advisory consultants who cover the financial institutions group channel within the firm's client group. Prior to this role, he was a divisional sales manager for the eastern part of the United States and a regional director, responsible for wholesaling Delaware Investments mutual funds and separate accounts to all financial channels in the Carolinas. Prior to that, he was an account manager with GTE/Verizon for five years in Myrtle Beach. Mr. Chorba earned a bachelor's degree in history from Furman University.

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Matt Coldren

Natixis Investment Management

EVP, Financial Institutions Group

Mr. Coldren oversees the Global Relationships team, which maintains all firm distribution and product relationships. In addition, he provides oversight to the offshore sales distribution efforts. Mr. Coldren joined the company in 2004 from MFS Investment Management, where he was vice president and national account manager. He was previously with Delaware Investments as a vice president and relationship manager. Mr. Coldren received his BS from Fairfield University and an MBA from the Drexel University LeBow School of Business. He is FINRA Series 7 and 24 licensed. Mr. Coldren also holds the Accredited Investment Fiduciary designation.

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Mark Connolly

Nuveen

Senior Managing Director, Head of Global Strategic Relations

Mr. Connolly is responsible for overall strategic firm relationships, both domestically and abroad, with a focus on identifying investment opportunities for partnership across sponsor platforms and discretionary mandates at Nuveen. Within the United States, this includes the wire, IBD, private bank, regional bank, and wealth sub-advised channels. In addition, he serves as a voting member on the public investments product committee and has oversight of the firm's closed end fund business development efforts. Prior to joining the firm in 2010, Mr. Connolly was a managing director and the associate director of Morgan Stanley Smith Barney's manager research team and worked closely with senior management, product management, and institutional level financial advisors. He entered the investment industry in 1994 and has held positions at Morgan Stanley, PNC Wealth Management, and JP Morgan Private Bank. He graduated with a BS in business administration with a concentration in finance from the University of Delaware and earned an MBA from Villanova University. Mr. Connolly serves on the board of Invest in Others, a charitable foundation that recognizes philanthropic contributions made by financial professionals and firms.

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Kevin Eknaian

American Century Investments

Senior Vice President and Head of Global Institutional and Workplace Sales

Mr. Eknaian serves as Senior Vice President and Head of Global Institutional and Workplace Sales. In this role, he leads the Global Institutional, Workplace Retirement, and National Accounts and Platform Development businesses for American Century Investments® and Avantis Investors®, overseeing sales efforts across these key client and distribution channels. He also serves on the firm's Management Committee, contributing his perspective and leadership experience to the organization's broader management discussions.

Mr. Eknaian has more than 26 years of financial services experience. Before joining American Century Investments, he was a senior financial advisor in Merrill Lynch's Private Client Group, where he developed and managed plan sponsor retirement accounts.

Mr. Eknaian earned a bachelor's degree in finance from Western New England University. He holds Series 7, 24, and 63 licenses, as well as the CIMA®, C(k)P, and CRPC® designations.

Mr. Eknaian completed executive education for the Certified Investment Management Analyst® designation at the University of Pennsylvania's Wharton School. His Money Management Institute credentials include the Executive IQ Program alumni program, Capstone Innovation Project, and Leadership Pathway alumni program, along with executive education and lifelong learning at the University of Virginia's Darden School of Business.

Mr. Eknaian aims to deepen his involvement with the Money Management Institute by continuing to support its professional mentoring programs and giving back to an organization that has provided valuable networking and development opportunities. He lives in Moorestown, New Jersey, with his wife, Jessica, and their three children. He enjoys traveling, golf, reading, technology, and spending time with family and friends. He is active in his children's sports and activities and volunteers in his community whenever possible.

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Tim Froehlich

Wells Fargo Advisors

Head of Investment Products, Wealth and Investment Management

Mr. Froehlich's responsibilities include the areas of product origination and distribution within Wells Fargo Advisors for the insurance, annuity, and market-linked investment product areas. He previously co-led the alternative investments group. Mr. Froehlich represents the investment products group on several Wells Fargo Advisors and Wells Fargo Investment Management committees, including serving as a co-chair of the Wells Fargo Advisors deal commitment committee. He was also instrumental in the development of the FA directed portfolio analytics group prior to group's move to WIM Investment Risk. Mr. Froehlich has been with Wells Fargo Advisors and its predecessors since February 2002. Prior to that, he spent five years as part of the ING broker-dealer network. He holds the Chartered Financial Analyst designation and is a member of the CFA Institute and the St. Louis Society of Financial Analysts. Mr. Froehlich graduated with a BS in business administration from the University of Richmond with concentrations in finance and international business. He currently serves on the boards of The Forsyth School, The St. Louis Rockets Hockey Club, and RISE Community Development.

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James Haddon

Ramirez Asset Management

Managing Director, Head of Strategic Marketing

Mr. Haddon, who has over 40 years of experience in asset management and investment banking, manages his firm's client service team and is responsible for developing marketing strategies to increase assets under management for Ramirez's fixed income products. Prior to joining Ramirez, he served as a senior partner and managing director at Public Financial Management from 2009 to 2014, where he oversaw all marketing and new business activities for national accounts in the asset management and financial advisor divisions. Mr. Haddon was also employed at Citigroup for over 15 years, serving in a range of asset management and investment banking positions. From 2006 to 2009, he was a managing director and sales manager in the alternatives distribution group, raising assets for private equity and hedge funds. From 1994 to 2006, he was a managing director in Citigroup's municipal securities division and served as head of the infrastructure group and on the division's executive and planning committees. Mr. Haddon has shown commitment to public service throughout his career. He currently serves as a trustee for the State University of New York and is on the board of the National Association of Securities Professionals. His earlier board service includes Wesleyan University, the Riverside Park Fund, the NYC Alzheimer's Association, Sponsors for Educational Opportunities, and the Upper Harlem Empowerment Zone. Mr. Haddon received an MBA from the Stanford University Graduate School of Business and a BA in Economics from Wesleyan University. He holds FINRA Series 7, 53 and 63 licenses.

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Pete Hill

State Street Investment Management

Managing Director, Head of RIA Channel

Mr. Hill is responsible for leading SSIM's distribution strategy with RIAs, which includes wealth managers, commercial RIAs, and RIA aggregators across the United States. Prior to his current role, he was head of emerging institutional sales and model portfolio solutions for the U.S. SPDR business. In that position, he and his team were focused on working with ETF strategists, digital wealth management platforms, commercial RIAs, and TAMPs. Additionally, he managed SPDR ETF's U.S. model portfolio solutions business. This role included distribution, key accounts, operations, and research. He has extensive experience working with sophisticated investment advisors, platforms, and fintech firms in developing wealth management solutions utilizing the SPDR family of exchange traded funds. Mr. Hill joined State Street Global Advisors (SSGA) in 2006 as a member of its internal sales desk and exchange traded fund group, working with advisors to educate them about the ETF market and subsequently to develop ETF solutions for its clients. Prior to SSGA, he was employed in Sovereign Bank's commercial banking division, working with middle-market, corporate, and institutional clients. Mr. Hill earned a BA in marketing from Providence College. He also holds FINRA Series 7, 63, and 24 licenses.

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Scott Kilgallen

Neuberger Berman

Managing Director, Head of NA Intermediary

Mr. Kilgallen, who joined Neuberger Berman in 2010, is the head of North American intermediary client coverage overseeing retirement, sub-advisory, broker-dealer, registered investment advisor, family office and private bank relationships in the United States and Canada. Prior to joining the firm, he worked for 11 years at Goldman Sachs Asset Management as a managing director and head of the platform distribution team within third-party distribution. He was responsible for overseeing sub-advisory, retirement, mid-market corporate and hedge fund of funds relationships within the United States and Canada. Earlier, he worked at United Asset Management, focusing on institutional corporate and consultant sales and at Fidelity Investments Institutional Services Co. as a vice president responsible for intermediary distribution of asset management and retirement services. Mr. Kilgallen, who earned a BA in economics from Boston College, is currently a member of MMI's Board of Governors.

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Christopher Lagan

Congress Asset Management

President, Portfolio Manager

Mr. Lagan joined Congress Asset Management in 1993 and currently serves as the firm's president. He also chairs the Private Equity Committee, overseeing sourcing, due diligence, and commitments across nearly $400 million in private equity allocations. In addition, he serves on the advisory boards of several private equity funds. Mr. Lagan is a CFA charterholder and a member of the CFA Society Boston and the CFA Institute. He also serves on the Board of Visitors for the Busch School of Business at the Catholic University of America and on the Board of Directors of the Boston Children's Museum.

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John Moninger

Allspring Global Investments

Head of U.S. Distribution

Mr. Moninger, who joined Allspring in 2022, is responsible for overseeing a next-generation, client-centric U.S. distribution model for Allspring. He leads the firm's retail sales, institutional sales, platform development, client service, and consultant relations teams. Previously, Mr. Moninger was managing director of intermediary sales for Eaton Vance, a part of Morgan Stanley Investment Management. In that role, he set the strategic direction and led the day-to-day operations for Eaton Vance's sales and relationship management and the Eaton Vance Advisor Institute. Mr. Moninger, who joined Eaton Vance in 2012, began his career in the investment management industry in 1994. Before joining Eaton Vance, he was executive vice president of advisory and brokerage consulting services with LPL Financial, where he was responsible for the firm's advisory and brokerage platforms and for leading a team of product consultants. He also led LPL's financial planning group and wealth management services, which provide advice and solutions for high-net-worth and ultra-high-net-worth client opportunities. Mr. Moninger was previously the national consulting director for investment solutions for UBS Financial Services and was affiliated with Alliance Capital Management. He earned a BS in business administration from Kutztown University and the Certified Private Wealth Advisor and Certified Investment Management Analyst designations. Mr. Moninger also serves as president of the SEAL-Naval Special Warfare Family Foundation.

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Jared Murphy

BlackRock

Managing Director, Head of Strategic Accounts, U.S. Wealth Advisory

Mr. Murphy, who joined BlackRock in 2007, oversees the firm's home office relationships across U.S. wealth management firms and platforms. Additionally, he is responsible for the investment due diligence function for BlackRock's alpha-seeking, SMA, models, and iShares investment capabilities. In earlier roles within BlackRock's U.S. Wealth Advisory business, he served as head of the investment solutions group and ran the bank wealth management-national accounts team. Prior to U.S. Wealth Advisory, Mr. Murphy worked in BlackRock's iShares business and led the team responsible for the distribution of fixed income iShares to institutional clients. He started his BlackRock career in the global liquidity business, where he oversaw the distribution, client servicing, and marketing of BlackRock's global liquidity solutions to financial institutions and third party intermediaries. Before joining BlackRock, he spent nine years at JPMorgan Asset Management, where he was a client advisor in its global liquidity business, working with Fortune 500 corporations and global financial institutions. Mr. Murphy earned a BA degree in economics from Cornell University.

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Daniel Noonan

Cohen & Steers

Executive Vice President, Head of Global Distribution

Mr. Noonan has more than 20 years of financial services experience. Prior to joining his current firm in 2024, he was with Nuveen, where he led the enterprise wealth and private capital group. Earlier, he was an executive vice president and head of ETF sales at PIMCO and head of wealth management sales at State Street Global Advisors. Mr. Noonan has a BA from Boston College and is based in New York.

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Leslie Oliversen

Madison Investments

Head of Key Accounts, Regional Director

Ms. Oliversen, an owner-operator at Madison Investments, oversees the team that manages partner relationships across all channels, including broker-dealer, independent broker-dealer, credit union, insurance, bank, private bank, fintech, and clearing firms. She personally covers many of her firm's key relationships and maintains a client list of firms located in both the United States and Toronto. Ms. Oliversen is a minority owner in Madison Investments. Prior to her current role, she held a variety of positions in sales and marketing, among them data analytics, marketing associate, internal wholesaler, and external wholesaler. She is an Interested Trustee on the Madison ETF Board of Trustees and chairs the board of the Madison Investments Foundation, which supports many worthy organizations. She is a FINRA registered principal and maintains Series 6, 7, 24, 63, and 65 licenses. Ms. Oliversen, who has been with Madison Investments since 2011, earned a BA from Edgewood College.

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Roger Paradiso

Franklin Templeton

Global Head of Custom Client Portfolios

Mr. Paradiso is an advisory solutions industry leader with expertise in innovation, transformation, business enhancement, and strategy. With a clear vision and creative solutions, he has emphasized the needs of the clients and ease of use, leading the way to new efficiencies and profitable businesses. He has shaped careers and developed trustworthy, reliable products for his organization. Mr. Paradiso has an ability to create focus, provide encouragement, and inspire collaboration that has led to leadership success and industry recognition. Currently, he is executive chairman of Franklin's O'Shaughnessy Asset Management. In this role, he is focused on new business development and leading and creating custom separately managed accounts. In addition to developing the strategies, he implements technology-enabled advice solutions to support existing intermediary channels and new potential areas of growth and access. During his career, he has worked for Franklin Templeton and predecessor firms for over 25 years. In 1997 at Citi Asset Management, he conceived, developed, and built out the company's unified managed account platform, an industry first. Two years later, he created the Private Portfolio Group, which was sold to Smith Barney (now Morgan Stanley) in 2008. That platform remains the industry's leading unified managed account and overlay manager. Mr. Paradiso returned from Morgan Stanley in 2016, where he had been managing director of investment solutions and portfolio development for the advisory business in New York. His team was responsible for manager research, manager selection, portfolio construction, account management, and trading. In addition, he built out and managed the third-party trust business. His business group managed over $130 billion in assets of which $30 billion was discretionary in over 225,000 accounts. Mr. Paradiso has received MMI's highest honors: the Advisory Solutions Pioneer Award in 2014 and the All-Star Achiever Award in 2016.

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Ron Pruitt

Orion

President, Wealth Management

Mr. Pruitt is responsible for sales, investment management, portfolio management, product management, and operations spanning Orion Portfolio Solutions, Brinker Capital Investments, Orion Custom Indexing, Orion Communities, and Orion OCIO. A CFA, he is a seasoned executive leader with over 25 years of wealth management experience. Prior to joining Orion in May 2024, he served as senior vice president of Nasdaq Analytics, formed through the acquisitions of eVestment and Solovis, which provides investment analytics and market intelligence to global asset managers, asset owners, and institutional investment consultants. Mr. Pruitt's career also includes serving as president and CEO of Solovis, a Nasdaq company known for its portfolio management software and services. He co-founded Placemark Investments, served as its chief investment officer, and authored Placemark's patent for overlay portfolio management. Placemark was later acquired by Envestnet, where Mr. Pruitt served on the leadership team post-acquisition. His career began at General Electric, where he achieved the status of Six Sigma Master Black Belt, underscoring his commitment to excellence and quality of operations. Mr. Pruitt holds a BS in econometrics from the United States Military Academy at West Point and an MBA from the University of Texas at Austin. His career also includes distinguished military service as an officer in the U.S. Army.

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Sheila Rapple

Blackstone

Senior Managing Director, Global Head of Investor Services, Private Wealth Solutions Group

Ms. Rapple oversees investor services and devotes much of her effort to helping to build out the processes needed to support new products and channels. Prior to leading investor services, she was head of the internal sales and service desk for the private wealth management group. Before joining Blackstone in 2011, Ms. Rapple worked at Legg Mason, where she held a number of different positions. Her most recent role was director, separately managed account product manager in Legg Mason's retail distribution unit, where she was responsible for SMA product maintenance, product development, platform placement, sales, marketing, operations, and client service. Ms. Rapple began her career with Smith Barney Asset Management working in its sales and marketing team promoting Smith Barney mutual funds and separately managed accounts.

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Amanda Robinson, CFA®

Fidelity Investments

Head of FI Wealth Advisory Managed Solutions Specialist Distribution

Amanda Robinson is head of Wealth Advisory Managed Solutions Specialist Distribution at Fidelity Institutional®. Fidelity Institutional is a division of Fidelity Investments that offers investment insights, strategies, and solutions, as well as trading services, to a wide range of wealth management firms and institutional investors. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals.

In this role, Ms. Robinson leads all managed solutions distribution for Fidelity Institutional including overseeing sales, relationship management, and strategic partnerships. Her team is responsible for delivering in depth support for Model Portfolios, SMAs, and FMAX (Fidelity Managed Account Exchange) helping advisors to meet the diverse and evolving needs of their clients.

Prior to that she played a key role in launching Fidelity Institutional' s Model Portfolios and Separately Managed Accounts (SMA), helping to shape the product strategy, distribution framework, and advisor adoption approach. Previously, Ms. Robinson was an inside wholesaler supporting the distribution of Fidelity Advisor funds, ETFs, and the Fidelity Advisor 401(k) platform.

Ms. Robinson earned her bachelor of science degree in finance from the University of Massachusetts Lowell. She is a CFA® charterholder and also holds the Financial Industry Regulatory Authority (FINRA) Series 7, 63, and 24 licenses.

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Amos Robinson

Charles Schwab

Managing Director, Head of Wealth and Asset Management Solutions

Mr. Robinson leads the team supporting distribution of wealth and advice solutions and Schwab Asset Management – the firm's wealth management and execution enterprise and asset management arm. Prior to this position, he led distribution and client relations supporting the Schwab ETFs, Schwab Funds, Charles Schwab Trust Bank collective investment trusts, and separate account strategies managed by Schwab Asset Management and Charles Schwab Investment Advisory, Inc. Before that, he led the retail sales, client service, and investment portfolio strategy teams supporting Schwab Asset Management. Mr. Robinson was a partner at ThomasPartners, Inc. until the firm's acquisition in 2012 by The Charles Schwab Corporation. Mr. Robinson earned a BS in economics from Saint Michael's College.



Karl Roessner

Vestmark

Chief Executive Officer

As a chief executive and board member, Mr. Roessner, has an exemplary record of growth and transformation. He is an action-oriented business partner and legal strategist with 10+ years of executive leadership in the financial services industry and 17+ years in law firms. He has extensive board experience as both a chief executive and key advisor to, and member of, public and private company boards. At Vestmark, he is responsible for the vision and strategic direction of the company, including new business growth and expansion into adjacent product lines, thereby broadening Vestmark's partnerships across fintech's ecosystem. Previously, he was the chief executive officer of Lefteris Acquisition Corp. and continues to serve as its vice chair as it winds down its operations. Earlier, he served for three years as the CEO of E*TRADE Financial Corporation and as the president of E*TRADE Bank. Mr. Roessner is also a member of the board of Oanda Global Corporation – a leader in online multi-asset trading services, currency data and analytics – and a member of the advisory board of Wizest, a next generation investing platform. Mr. Roessner earned a JD cum laude from St. John's School of Law, where he was a member of the St. John's Law Review, and he holds a BA in business administration cum laude from Siena College.

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David Russo

iCapital

Managing Director, Wealth Managers

Mr. Russo leads iCapital's enterprise wealth client management function. Prior to joining iCapital, he was COO of Assets & Investments at Credit Suisse Private Banking Americas, where he was responsible for driving cross-product business development along with leading the consolidation and growth strategy for the firm's investment advisory offerings. Prior to Credit Suisse, Mr. Russo was a director in the managed solutions group at Bank of America Merrill Lynch, where he headed the firm's $200 billion rep-as-advisor investment advisory platform. Prior to Merrill Lynch, he was a vice president at Morgan Stanley Wealth Management, where he served as program manager of the rep-as-advisor platform. Mr. Russo holds FINRA Series 7, 24, and 66 licenses, and a BS in business administration with concentrations in accounting & finance from Georgetown University.

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Chris Scott-Hansen

Morgan Stanley Wealth Management

Managing Director, Head of Investment Advisory Solutions

Mr. Scott-Hansen, who is based in New York City, heads Morgan Stanley's $2 trillion dollar investment advisory business (Consulting Group). He previously led his firm's trading and managed solutions areas, which included the equity, options, advisory and E*TRADE fixed income trading desks for Morgan Stanley Wealth Management as well as its portfolio risk platform and overall Aladdin risk management strategy and its managed advisory portfolio solutions (MAPS) models/SMA businesses. Earlier, he led Morgan Stanley's trust and retirement divisions, which included individual retirement, business retirement, insurance, annuities, trust services, and financial planning. Before joining Morgan Stanley, he was a long-only equity and multi-strategy portfolio manager with Legg Mason/ClearBridge Investments. Mr. Scott-Hansen earned a BS in finance from Bryant University in Rhode Island.

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Danielle Singer

Invesco

Head of Wealth Management Platforms

Ms. Singer's team is responsible for leading the firm's partnership engagement to align its clients' priorities with Invesco's capabilities. Additionally, Ms. Singer is a member of the Americas Distribution senior leadership team, where she works on strategic priorities including product development and activation across private markets, separately managed accounts, models, and ETFs. Ms. Singer joined Invesco in 2014. Prior to her current role, she served as head of platforms due diligence and has held various investment roles, including head of North America and EMEA client solutions and multi-asset portfolio manager. Ms. Singer has been in the financial services industry since 2002. Ms. Singer earned a BA degree from Middlebury College and an MBA from the University of Chicago Booth School of Business. She is a Chartered Financial Analyst and a Chartered Alternative Investment Analyst charterholder. Ms. Singer holds FINRA series 7, 24, and 66 registrations.

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Pete Thatch

Capital Group

SVP, Head, Strategic Relationship Group

Mr. Thatch, who is based in Los Angeles, is responsible for leading relationships with U.S. distribution partners across wealth management, insurance, and retirement, including the global enterprise relationship and practice management teams at Capital Group, home of American Funds. He has 31 years of investment industry experience and has been with Capital Group for 10 years. Earlier in his career at Capital, he held various positions including head of wealth management national accounts and director of product management, responsible for retail product management and strategy. Prior to joining Capital, he was managing director and head of third-party product offerings at Merrill Lynch. Before that, he worked in positions supporting investment product and distribution at Merrill Lynch Investment Managers and BlackRock. Mr. Thatch holds a BA in economics from Rutgers University.

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Troy Thornton

Goldman Sachs Asset Management

Co-Head, Americas Third-Party Wealth

Mr. Thornton is also a member of the Asset & Wealth Management Inclusion and Diversity Council. Prior to assuming his current position, he was co-head of the Americas retail client business, head of key accounts and platform development, and national sales manager of the investment consulting group in U.S. third-party distribution. He previously held various management positions in U.S. third-party distribution and U.S. institutional distribution, including co-head of the public funds group and head of registered investment advisor distribution. Mr. Thornton joined Goldman Sachs in 1997 as a regional sales director in third-party distribution within Goldman Sachs Asset Management. He was named managing director in 2008 and partner in 2022. Before joining the firm, he spent five years in asset management distribution for Federated Investors and Bankers Trust Global Investors. Mr. Thornton was chair emeritus of the MMI Board of Governors and served on its Executive Committee. He is also a member of the distribution council of the Investment Management Education Alliance and the sales and marketing committee of the Investment Company Institute. Mr. Thornton chairs the advisory board of The Pennsylvania State University Educational Equity Program and serves as an advisory board member of Wellness in the Schools, a nonprofit that promotes healthy eating, environmental awareness, and fitness for children in New York City public schools. Mr. Thornton earned a BA in political science from The Pennsylvania State University.

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Russ Tipper

Edward Jones

General Partner

Mr. Tipper leads the products and solutions area within Wealth Management and Field Management, which includes the firm's trading, trust, investment advisory, managed investments, protection, retirement, and banking products and capabilities. He is responsible for leading and coordinating the firm's product strategy and the ongoing product management of those capabilities to enable branch teams to deliver tailored solutions that both help clients work toward achieving their financial goals and enhance the value they provide clients in the future. Mr. Tipper began his career in 1997 as a financial advisor for PaineWebber, now UBS, in Chicago. Over the next seven years, he held product management and marketing roles at Putnam investments and Nationwide Financial before joining Bank of America Merrill Lynch. In his 11 years with Merrill, he was a managing director responsible for leading the third-party discretionary and client discretionary investment advisory programs, as well as building and transitioning clients to Merrill One, the firm's consolidated investment advisory program. In 2016, Mr. Tipper joined Capital Group as an SVP leading product management and strategy for the wealth management client group. He led several initiatives to build out Capital's investment capabilities to support clients' and advisors' transition to investment advisory, an assignment that included building out the firm's SMA and model portfolio capabilities. His team was also responsible for the mutual funds, 529, and ABLE investment capabilities. Mr. Tipper earned a BA in economics from Denison University and an MS in finance from Northeastern University. He also holds the CIMA designation and FINRA Series 7, 66, 24, and 51 licenses.

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George Whitmore

Anchor Capital

Head of Business Development and Client Relations

Having joined Anchor in 2012, Mr. Whitmore's primary responsibilities, which he assumed in 2019, are managing the firm's sales and marketing efforts. This includes the oversight of Anchor's three client divisions – Private Client, Managed Accounts, and Institutional. Prior to his current role, he managed Anchor's Private Client Division, including the servicing and developing of client relationships. Prior to joining Anchor, he was the Eastern Division Director responsible for Russell Investments, a U.S. Private Client sales and client service business. In this role, his responsibilities included recruitment, management, and development of Russell Investment's regional directors, who service independent advisors, bank/trust companies, non-profits, and broker-dealer firms in the eastern United States. Mr. Whitmore, who joined Russell in 2003 as a regional director responsible for managing Russell's client relationships in New England, was appointed to his latest role there in 2005. Before Russell, he was a vice president at Standish Mellon Asset Management responsible for the marketing and sales of Standish's investment strategies to the registered investment advisor and high net worth communities. He serves as a trustee for the South Shore Hospital Charitable Foundation and is a board member of the Hingham Sports Partnership.

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Chris Wilson

Principal Asset Management

Managing Director, Wealth Advisory Solutions

Mr. Wilson is responsible for distributing his firm's investment strategies through retail financial intermediaries in the Eastern region of the United States. He joined Principal in 2005 and has over 25 years of industry experience. Earlier, he was a vice president at Overture Asset Managers. He received a BA in history and political science from Colgate University. Mr. Wilson is a CIMA professional and a member of both MMI and the Investments & Wealth Institute. He is a registered representative of Principal Funds Distributor and holds FINRA Series 7, 24, 51, 63, and 65 licenses.

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