MONEY MANAGEMENT INSTITUTE

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Communities

Membership Communities	Community Leaders			MMI Liaison
Alternative Investments—Serve as an expert resource on the development of alternative investment products and their appropriate placement in advisory solutions.	Sheila Rapple	Blackstone	sheila.rapple@blackstone.com	Arlen Oransky aoransky@mminst.org
	Lina Rubin	UBS Financial Services	lina.rubin@ubs.com	
NOW FORMING **Annuity & Insurance Solutions—**Encourage dialogue among key stakeholders from the product, distribution, asset manager, and wealth management sides of the business to discuss emerging trends, opportunities, and challenges.	Tim Munsie	Jackson National Life	timothy.munsie@jackson.com	Arlen Oransky aoransky@mminst.org
	Corey Walther	Allianz Life	corey.walther@allianzlife.com	
Digitally-Enhanced Advice—Serve as a forum to expand the industry's knowledge base and effectiveness by identifying trends, opportunities, best practices, and challenges in providing comprehensive advice where technology and advisor delivery help investors achieve their financial and life goals.	Steve Harris	Edward Jones	steven.harris@edwardjones.com	Joan Lensing jlensing@mminst.org
	Jack Sharry	LifeYield LLC	jack.sharry@lifeyield.com	
NOW FORMING **Distribution & Sales—**Provide a forum for financial services sales executives to discover, promote and enhance best practices in the wholesaling community.	Jeff Carlin	Nuveen Investments	jeff.carlin@nuveen.com	Arlen Oransky aoransky@mminst.org
	John Moninger	Eaton Vance	jmoninger@eatonvance.com	
Diversity & Inclusion—Facilitate thoughtful and action-oriented dialogue to advance the efforts of diversity & inclusion in the financial services industry and share best practices.	Josean Fernandez	BlackRock	josean.fernandez@blackrock.com	Shewanna Grasty sgrasty@mminst.org
	Lauren Ziadie	Morgan Stanley	lauren.ziadie@morganstanley.com	
Emerging Asset Managers—Provide an executive forum designed for managers that are new to advisory solutions and are looking to enhance distribution and gain insight and perspective on the industry.	Mike Saliba	Baillie Gifford International	michael.saliba@bailliegifford.com	Arlen Oransky aoransky@mminst.org
	Robert Tynes	Confluence Investment Management	rtynes@confluenceim.com	
ETFs & Structured Products—Monitor developments in the ETF and ETN industry and address the inclusion of these products in advisory solutions and how advisors can use them efficiently.	Kate Bernhardt	BlackRock	kathryn.bernhardt@blackrock.com	Arlen Oransky aoransky@mminst.org
	Brooks Friederich	Envestnet	brooks.friederich@envestnet.com	
Human Resources—Connect Human Resources (HR) professionals across the investment advisory solutions industry to discuss various challenges and opportunities impacting HR functions, share best practices, and advocate for new and/or improved HR policies.	Roz Davis	Salient Partners	rdavis@salientpartners.com	Samantha Lustig slustig@mminst.org

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NOW FORMING **Learning & Professional Development—**Connect and leverage the expertise of talent development leaders to advance workforce skills preparedness and the next generation of continuous learning to attract and keep the best and the brightest professionals.	Tim Williams (interim chair)	Money Management Institute	twilliams@mminst.org	Tim Williams twilliams@mminst.org
Legal & Compliance—Monitor regulatory and public policy developments and serve as a resource to study key issues for consideration.	Allison Bevacqua	LPL Financial	Allison.Bevacqua@lpl.com	Samantha Lustig slustig@mminst.org
	Lisa Detwiler	FS Investments	lisa.detwiler@ franklinsquare.com	
Mutual Funds—Designed for investment managers to address issues unique to mutual fund offerings (both open end and closed end funds).	Shannon Larson	Advisor Group	slarson@advisorgroup.com	Arlen Oransky aoransky@mminst.org
	Tom Morelli	T. Rowe Price	tom_morelli@troweprice. com	
SMAs & Model Portfolios—Monitor developments in the SMA and Model Portfolios space and serve as an expert resource on how the changes impact the advisory solutions industry.	Sam Marciano	Legg Mason	smarciano@leggmason. com	Arlen Oransky aoransky@mminst.org
	Russell Tipper	Capital Group | American Funds	rswt@capgroup.com	
NOW FORMING **Sustainable Investing—**Advance the practical application and integration of ESG and Impact Investing by sharing knowledge, building networks and contributing valuable education and resources.	Tim Williams (interim chair)	Money Management Institute	twilliams@mminst.org	Tim Williams twilliams@mminst.org
Technology & Operations—Monitor developments in technology and operations that affect how MMI members conduct their business and serve as a discussion forum for sponsor and manager firms to resolve operational problems.	Kyle Simpson	FS Investments	kyle.simpson@ franklinsquare.com	Arlen Oransky aoransky@mminst.org
	Arvind Ramakrishnan	Morgan Stanley	arvind.ramakrishnan@ morganstanley.com	
Women in Wealth Management—Encourage and mentor women professionals navigating the start of their careers and provide continuing inspiration and guidance to all women advisory professionals.	Lori Hardwick	Riskalyze	lori.harwick@gmail.com	Joan Lensing jlensing@mminst.org
	Cheryl Nash	FIserv	cheryl.nash@fiserv.com	Sarah Nau sarahnau@mminst.org

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