

**Morningstar Direct Forum | Boston Oct. 26**

<b>First Name</b>	<b>Last Name</b>	<b>Company</b>
Mark	Alaimo	SAPERS & WALLACK, INC
Iskandar (Alex)	Arifin	UNIVERSITY OF MASSACHUSETTS-LOWELL
Mark	Barry	CENTERPOINT ADVISORS, LLC
Richard	Blair	AMHERST COLLEGE
Aaron	Bock	THE COLONY GROUP
Marcin	Bolec	FIDELITY
Michael	Bove	RINET COMPANY, LLC
Kip	Brown	DEUTSCHE ASSET MANAGEMENT
William	Bryce	DEUTSCHE ASSET MANAGEMENT
Michael	Cerqueira	THE COLONY GROUP
Jeannie	Chun	FIDELITY INVESTMENTS
Kevin	Coughlin	FIDELITY INVESTMENTS
Stephen	Cummings	PIONEER INVESTMENTS
Nicolas	Curtis	PAX WORLD
Justine	Decoste	PATHSTONE FEDERAL STREET
Justine	Decoste	PATHSTONE FEDERAL STREET
Colin	Delaney	EVENTIDE ASSET MANAGEMENT
Julie	Delongchamp	WELLINGTON MANAGEMENT COMPANY LLP
Caitlin	Dourney	FIDELITY INVESTMENTS
Martin	Dunn	SSGA
Jennifer	Dwyer	COLUMBIA THREADNEEDLE INVESTMENTS
George	Fontaine	NATIXIS GLOBAL ASSET MANAGEMENT
Greg	Frazier	JOHN HANCOCK
Alexandra	Frech	MARKET METRICS
Heather	Gallant	FIERSTON FINANCIAL GROUP
Heidi	Garrity	FIERSTON FINANCIAL GROUP
Jeff	Gendron	LFN
Michael	Geraci	COMMONWEALTH FINANCIAL NETWORK
Kathleen	Glowacki	BARTHOLOMEW & COMPANY, INC.
Nathan	Goodwin	CITIZENS SECURITIES INC.
Mayank	Goradia	FIDELITY INVESTMENTS
Jeanne	Griffith	FIDELITY INVESTMENTS
Brian	Griggs	SSGA
Daphne	Gu	NATIXIS GLOBAL ASSET MANAGEMENT
Michael	Hamilton	MERRILL EDGE
Christopher	Harding	FIDELITY INVESTMENTS
Bill	Hayes	CHARLES CARROLL FINANCIAL PARTNERS
Barry	Hilliard	SANTANDER SECURITIES
Dave	Hoff	ROBINSON HILL LLC
Tom	Hudson	TFC FINANCIAL
Ruhan	Inanoglu	NATIXIS GLOBAL ASSET MANAGEMENT
Varad	Joshi	MFS
Timothy	Kaijala	ROPES WEALTH ADVISORS
Brian	Katz	THE COLONY GROUP
David	Lee	SSGA

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Wei	Li	JOHN HANCOCK
Shiwen	Lin	FIDELITY INVESTMENT
Wen	Liu	WELLS FARGO
Alex	Loebs	FIDELITY
Sara	Louis	WELLINGTON MANAGEMENT COMPANY
Cameron	Maddox	FMR
Jeffrey	Malmin	JOHN HANCOCK
Jonathan	Marcus	MARCUS FINANCIAL ADVISORS
David	Marshall	JH INVESTMENTS
Michael	Mcclain	LPL FINANCIAL
Sarah	Mccready	DIREXION
Terrence	Mcmahon	MORGAN STANLEY
Michael	Mcmanus	ROCKLAND TRUST
Bryan	Meckley	CAMPBELL AND COMPANY
Prim	Mitchell	JOHN HANCOCK INVESTMENTS
Leah	Mullen	PUTNAM INVESTMENTS, LLC
Robert Neilson	Neilson	COLUMBIA THREADNEEDLE
Matthew	Neyland	SK WEALTH MANAGEMENT
Ed	Nosalek	FIDELITY INVESTMENTS
James	Oconnell	PIONEER INVESTMENTS
Trysia	Odorczyk	SSGA
Brett	Olsen	NATIXIS
Stephen	Ostrowski	FIDELITY INVESTMENTS
Blake	Perkins	DAINTREE ADVISORS LLC
Nicholas	Perkins	JOHN HANCOCK INVESTMENTS
Brian	Pineau	PATHSTONE FEDERAL STREET
David	Pisacich	FIDELITY INVESTMENTS
Jp	Powers	ROPES WEALTH ADVISORS
Jie	Qin	STATE STREET GLOBAL ADVISORS
James	Rocha	SSGA
Michael	Romano	RS
Allyn	Ross	FIDELITY INVESTMENTS (STRATEGIC ADVISERS, INC.)
Anthony	Ross	FIDELITY
Lisa	Sampson	BNY MELLON WEALTH MANAGEMENT
Sid	Sathe	MARKET METRICS
Chelsea	Savery	THE BOSTON COMPANY ASSET MANAGEMENT
Randy	Schaible	MONTIS FINANCIAL
Brett	Schneider	SENTINEL BENEFITS & FINANCIAL GROUP
Dylan	Semple	THE BOSTON COMPANY
Steven	Serrano	NEW ENGLAND PRIVATE WEALTH ADVISORS
Sumit	Sharma	FIDELITY
Ujjwal	Sinha	BANK OF AMERICA
Vijay	Sinha	ALPHA INVESTMENT CONSULTING OF BOSTON
Suzanne	Smetana	FIDELITY INVESTMENTS
Tim	Stickney	LFN

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Emily	Theurer	STATE STREET GLOBAL ADVISORS
Tracy	To	NATIXIS GLOBAL ASSET MANAGEMENT
William	Tuttle	CAPITAL WEALTH MANAGEMENT, INC.
Jerry	Vainisi	TS CAPITAL
Bret	Valerio	BNY MELLON
Karen	Van Voorhis	SAPERS & WALLACK
Mark	Vetrano	SUFFOLK UNIVERSITY
Matthew	Warlick	PERSPECTA TRUST
Grace	Waters	COLUMBIA THREADNEEDLE
Takaya	Weckle	JOHN HANCOCK
Paul	Wharf	RISK PARADIGM GROUP
Lily	White	MEKETA INVESTMENT GROUP
Susanna	Yam	ALLIANCEBERNSTEIN
Xiaoyu	Zhu	FIDELITY INSTITUTIONAL ASSET MANAGEMENT