



Tiburon CEO Summit XIX was held October 6-7, 2010 in San Francisco, CA, at the Ritz-Carlton Hotel.

Tiburon would like to thank these outstanding speakers for their dynamic presentations:

Judy Barber (CEO, Family Money Consultants)	Ron Carson (CEO, Carson Wealth Management Group)	Jeff Maggioncalda (CEO, Financial Engines)	Don Phillips Award Recipient (President, Fund Research, Morningstar)	Mark Yusko (CEO, Morgan Creek Capital Management)
Dale Brown (CEO, Financial Services Institute)	Harold Evensky (President, Evensky & Katz)	Joe Mansueto Award Recipient (CEO, Morningstar)	Meir Statman (Professor, Santa Clara University)	

Tiburon is proud that over 120 C-level clients took time out to attend:

Chip Roame (Managing Principal, Tiburon Strategic Advisors); Gurinder Ahluwalia (CEO, Genworth Financial Wealth Management); Mike Apker (Business Head, Reporting & Data Aggregation Services, Investnet Asset Management); Chuck Baldiswieler (CEO, TCW Funds); Judy Barber (CEO, Family Money Consultants); Tony Batman (CEO, 1st Global Capital Corporation); Dave Baum (Partner, Alston & Bird); Jordan Berlin (Senior Managing Director, Advanced Equities Financial Corporation); Tom Bradley (President, TD Ameritrade Institutional Services); Dale Brown (CEO, Financial Services Institute); David Brown (Partner, Alston & Bird); Sal Capizzi (Chief Sales & Marketing Officer, Dunham & Associates Investment Counsel); Mitch Caplan (CEO, Jefferson National Financial); Ron Carson (CEO, Carson Wealth Management Group); Peng Chen (President, Ibbotson Associates); Bernie Clark (Executive Vice President, The Charles Schwab Corporation); Dennis Clark (President, Advisor Partners); Eric Clarke (President, Orion Advisor Services); Todd Clarke (President, CIS Investments); Craig Cloyd (President, Calvert Distributors); Steve Cohen (Chief Strategy Officer, Pro Funds Group); Ron Cordes (Co-Chairman, Genworth Financial Wealth Management); Trish Cox (Business Head, Corporate Brokerage Services Division, The Charles Schwab Corporation); Bill Crager (President, Investnet Asset Management); Peter Crenier (Business Head, Information Systems, Fiserv Corporation); Ben Cukier (Partner, FTV Capital); Jeff Cusack (President, Forward Management); Pete D'Arrigo (Chief Financial Officer, Investnet Asset Management); Todd David (Partner, Alston & Bird); Dick Davies (Senior Managing Director, Alliance Bernstein); Jeffrey Dunham (CEO, Dunham & Associates Investment Counsel); Steve Dunlap (President, Pershing Managed Account Solutions); Mike Durbin (President, Fidelity Institutional Wealth Services); Ric Edeiman (CEO, Edelman Financial Services); Cynthia Egan (President, Retirement Plan Services, T. Rowe Price Group); Harold Evensky (President, Evensky & Katz); Tom Florence (Principal, 361 Capital); Jon Foster (President, Carson Wealth Management Group); Joe Gil (Managing Director, Morgan Creek Capital Management); Dave Goerz (Chief Investment Officer, High Mark Capital Management); Rich Goldman (CEO, Security Global Investors); Craig Gordon (President, RBC Correspondent Services); Larry Greenberg (President, Jefferson National Financial); Barnaby Grist (Executive Vice President, Cetera Financial Group); Blake Grossman (Vice Chairman, Black Rock); Matt Grove (Business Head, RIA Business, New York Life); Jim Hale (Founding Partner, FTV Capital); AJ Harper (Co-President, Pershing Managed Account Solutions); Bill Harris (Chairman, My Vest Corporation & Personal Capital Corporation); Pete Hess (President, Advent Software); Gary Holland (Publisher, Barron's); David Holmes (Chief Investment Officer, Dunham Trust Company); Bob Huret (Founding Partner, FTV Capital); Brian Jacobs (CEO, Hatteras Funds); Bryce James (President, Smart Portfolios); Steve Janachowski (CEO, Brouwer & Janachowski); Tif Joyce (President, Joyce Financial Management); Jeff Lancaster (Principal, Bingham, Osborn, & Scarborough); Randal Langdon (President, Lindner Capital Advisors); Stephen Langlois (Executive Vice President, LPL Financial); David Lau (Chief Operating Officer, Jefferson National Financial); Chuck Lewis (CEO, My Vest Corporation & Personal Capital Corporation); Gary Liberman (Chief Financial Officer, Meridian-IQ); Robert Lindner (CEO, Lindner Capital Advisors); Julie Littlechild (CEO, Advisor Impact); Joe Luby (CEO, Jagen Investments); Matt Lynch (CEO, Capital Analysts); Jeff Maggioncalda (CEO, Financial Engines); Norman Mains (Chief Risk Officer, Forward Management); Frank Maiorano (CEO, Trust Company of America); Joe Mansueto (CEO, Morningstar); Jim McCool (Executive Vice President, The Charles Schwab Corporation); Pat McEvoy (CEO, Woodbury Financial); Gerry McGraw (President, Fidelity Institutional); Kirk Michie (Managing Partner, Triton Pacific Securities); Sanjiv Mirchandani (President, National Financial Services); Vicky Mokkarala (Executive Vice President, Investnet Asset Management); Jeff Montgomery (CEO, AI Frank Asset Management); Kevin Mooney (Executive Vice President, Jagen Investments); Randy Moore (Partner, Alston & Bird); Kathryn Morrison (CEO, Sun Star); Mike Mulcahy (President, Bridgeway Funds); Cheryl Nash (Global Business Head, Business Development, Investment Services, Fiserv Corporation); Charlie Nelson (President, Great West Retirement Services); Christine Nigro (President, Axa Advisors); Michael O'Keeffe (Business Head, Investment Management & Guidance, Merrill Lynch Wealth Management); Harry O'Mealia (CEO, Legg Mason Investment Counsel); Terry Otton (CEO, RS Investments); Greg Pacholski (CEO, Albridge Solutions); Purna Pareek (Business Head, Advice America); David Perkins (Chairman, Hatteras Funds); Don Phillips (President, Fund Research, Morningstar); John Phillips (Executive Vice President, National Financial Services); James Poer (CEO, NFP Securities); Andy Putterman (CEO, Fortigent); George Riedel (Business Head, Intermediary Distribution, T. 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Tiburon also thanks the long-time clients who made the event possible by sponsoring, including:

