Tiburon CEO Summit LI — Attendee List

October 19–21, 2026 · InterContinental Hotel, Boston, MA

The following 527 Tiburon members have confirmed their attendance for Tiburon CEO Summit LI:

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Partner, Business Transactions Group, Seward & Kissel

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Managing Director, Global Asset & Wealth Management, TD Cowen

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Partner, Motive Partners

Arianne Adams
Managing Director, Product Strategy, Charles Schwab

James Amen
Managing Director, Wealth Management, Ardea Partners

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CEO, OneVest

Andrew Altfest
CEO, FP Alpha

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Managing Director, Digital Solutions, Cetera Holdings

Jenn Anderson
Chief Marketing Officer, Hightower Holding

Sam Anderson
Chief Capital Officer, Dynasty Financial Partners

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CEO, Advyzon Investment Management

Joe Anthony
President, Gregory

Anthony Aulisa
Chief Operating Officer, Wealthie

Megan Averitt
Chief of Staff, Franklin Templeton

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Sabrina Bailey
President, Foundation Source Philanthropic Solutions

Will Bailey
President, APAC, Communify

Wayne Baker
Chief Investment Officer, TIAA Ventures, TIAA

Ananya Balaram
Chief Revenue Officer, Advisor360

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CEO, JAB Institutional, JAB Insurance

Cody Barbo
CEO, Trust & Will

David Barnard
CEO, Luminary Platforms

Karen Barrett
CEO, Unbiased

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Business Head, Broker/Dealer Channel, Financial Advisor Services, The Vanguard Group

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Managing Director, Asset & Wealth Management, Alvarez & Marsal

Brady Beals
Chief Investment Officer, Luma Financial Technologies

Noreen Beaman
Founder, East Bay Executive Consulting

Eric Becker
Co-Chairman, Cresset Capital Management

Kirk Bell
President, Independent Contractor Division, Raymond James Financial

Michael Bell
CEO, Meketa Capital

Dave Bellaire
General Counsel, Financial Services Institute

Clark Bellin
President, Bellwether Wealth

Michael Benedek
Managing Director, Unified Managed Household Group

Jeff Benfield
Chief Product Officer, SEI Investments Company

Tobin Bennion
Executive Vice President, Sales, Jump Advisor AI

Christina Benoit
Managing Director, Smartleaf

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Chief Strategy & Execution Officer, JAB Institutional, JAB Insurance

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CEO, Ridgeline

Brian Bleasdell
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Mike Blundin
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Sean Brown
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Dane Snowden
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Ram Subramaniam
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