

NEW DataInnovatorsSM

From the team at SGI that manages numerous executive groups in the asset management industry is DataInnovatorsSM, the new community to connect Business Intelligence, Data & Analytics, Product and Distribution professionals.

Through DI, this community of professionals will benefit from numerous exclusive services including:

- Access to a network of industry peers
- Best practice-focused webinars and events designed to provide guidance & thought leadership that helps members develop and execute on their firm's strategy
- Contact hub for member, vendor and expert-authored content
- First-look access to new technologies and tools
- Ongoing continuing education
- Professional development and team strategy workshops



"I look forward to this group garnering enough members to where we are able to facilitate consistent educational opportunities through white papers, webinars and other forms of communication, helping our firms to continue to build resources and teams."

– Ken Burd, Business Manager – Client Group
Macquarie Investment Management | MIM Americas

Membership Fees

Community membership can be accessed through a yearly subscription on an individual or team basis. Subscription available to professionals at investment management firms only.

\$1,995/individual

\$1,595/individual for firms with 3+ individuals joining

Please email DIConnect@smithgroupinc.com to learn about team rates.

Meet the Team

To ensure the best community experience, the DI team blends SGI's management expertise with the inside perspectives of three investment management professionals. The result is seamless, delivering the community experience Business Intelligence professionals need to lead their firms to success.

SGI Team

Brian M. Smith, President



President of Smith Group Inc., Brian M. Smith, has over 20 years of experience in the mutual fund industry, ranging from serving as a Vice President of Marketing to Executive Director of the MFEA and other trade groups. In 2010 he was named one of the 100 most influential executives in the industry. In his current capacity he is the executive leader of SGI and head of the Marketing department.

Libby Hastert, Program Manager



With experience in communications and marketing in the biotech, corporate communications and now financial services industry, Libby brought her expertise to a number of SGI clients. Among her many accomplishments is the development of a digital content system called ContentCompleteSM. As Program Manager for DI Connect, she works to connect Business Intelligence professionals in the investment management sector with peers and experts, helping firms to continue to build resources and teams.

Program Advisor

Dan Faller, Experienced Asset Management Sales & Data Professional



After nearly two decades in the investment management industry, Dan brings innovative sales enablement expertise to the discussion. With a specialty in productivity and profitability enhancement, Dan has a track record of proven excellence in areas of financial analysis, strategy development and operational improvement skills.

Consulting Advisors

Ken Burd, Business Manager – Client Group — Macquarie Investment Management | MIM Americas



Ken facilitates distribution strategy, design, implementation and tracking, while also coordinating expense reporting, and headcount forecasting. Ken manages the Sales Strategy & Analytics team, which focuses on translating internal and external data into usable information with the intent of driving distribution alpha across both the retail and institutional distribution teams.

John Pumphrey, Vice President & Director of Distribution Analytics — Eaton Vance Distributors



John is responsible for data integrity and sales analytics within Eaton Vance Distributors. He acts as a liaison to IT, mutual fund operations and financial for all systems used, including customer relationship management, compensation and mobile devices.

For more information on Data InnovatorsSM or SGI, contact [Libby Hastert](#).

SGI's Community Connect focuses on delivering the services professional communities want and need making them the asset management industry's partner of choice for peer communities nationwide. As a firm with deep experience in community management for the asset management industry, SGI is set to provide a complete community experience — beginning with you. [Learn more about SGI.](#)