

# Fiduciaries (Prudent Investor Elections by Entity Name)

Last updated 3/31/2024

Fiduciary Name	Document Date (month/day/year)
<b>A</b>	
Account No. 2-565 Salomon Smith Barney	6/5/2001
Account No. 9-565 Salomon Smith Barney	6/5/2001
Account No. 12-302 Salomon Smith Barney	6/4/2002
Account No. 7-786 Smith Barney	3/25/2004
Account No. 10752 Citigroup Global Markets	8/13/2004
Account No. 16-502 Smith Barney	10/19/2004
Account No. 11-508 Smith Barney	10/25/2004
Account No. 16-320 Citigroup Global Markets	7/25/2005
Account No. 11-155 Citigroup Global Markets	4/27/2006
Account No. 04665 Citigroup Global Markets	10/30/2006
Account No. 04661 Citigroup Global Markets	10/30/2006
Account No. 559-12 Smith Barney	2/1/2008
Account No. 1155C Smith Barney	9/11/2009
Account No. 1158C Smith Barney	9/16/2009
Account No. 1156C Smith Barney	9/16/2009
Abell, W. Sheppardson	2/20/2001
Abell, W. Sheppardson	12/26/2012
Adams, Richard T	8/1/2008
Adelberg, Rudow, Dorf & Hendler, LLC	11/13/2012
Albrecht, Douglas H	7/17/2006
Allen, Carrie Lee	8/5/2020
Alpert, Andrew	12/19/2002
Altman, Gary	8/10/2012
Amalfitano, Maria	7/3/2001
Anstey, Mark M.	11/8/2000
Applefield, David B.	11/13/2012
Arbit, Terry S.	1/14/2011
<b>B</b>	
Baldino, Brett F.	10/17/2019
Bayless, Amanda C.	10/24/2008
Bell, Donna	5/28/2002
Beres, William P., Jr.	11/2/2000
Bernstein, Aaron	9/6/008
Bernstein, Jonathon	1/17/2002
Biddison, Susan H.	1/29/2007
Blaustein, Mary Jane	5/2/2007
Bliss, Edward P.	12/5/2005
Bowers, Larry A.	9/5/2008

Boylaiz, A. Patrick	3/25/2010
Brooks, Joseph A.	2/14/2000
Brown, George	4/5/2007
Brown, Jeremy Earle	3/11/2002
Brown, Nanci S	2/6/2006
Brown IV, Sewell A.	
Brown, Stuart D.	4/24/2001
Burch, Richard C.	6/17/2005
Burch, Richard C.	3/27/2008
<b>C</b>	
Campbell, Frank	10/1/2012
Campbell, Julia B.	5/31/2011
Cantin, Mary J.	4/6/2000
Cantor, Amy J.	12/16/2004
Carpenter, Robert	7/15/2010
Cooper, Carol G.	11/13/2012
Core, Eric M.	12/15/2005
Coyne, Mary Beth	2/29/2004
Cronin, Alice W.	12/22/1999
Cruttenden, Danielle M.	1/30/2014
Cruttenden, Danielle M.	2/5/2014
<b>D</b>	
Dagurt, Sheldon G.	8/23/1999
Daniels, Mark H.	1/26/2002
De Stefano, Gina M.	8/23/1999
DeGraba, Susanna G.	9/5/2008
Dinn, Irwin J.	6/17/2009
Dolina, Anna M.	9/25/2002
Doody, Robert J.	9/20/2021
<b>E</b>	
Edwards, Peter	1/12/2001
Ellingsworth, Richard	5/28/2003
Ellison, S. Ronald	8/23/1999
Evans, Jeffrey S.	11/13/2012
<b>F</b>	
Farrell, Kathryn Ann	3/10/2009
Fee, Edwin G	11/15/2000
Feldman, Charles J.	9/8/2015
Fidis, Marcia C.	10/28/2002
Foran, Louis J.	11/12/2007
Ford, David A.	7/11/2016
<b>G</b>	
Garten, Alan F.M.	8/23/1999
Garten, Herbert S.	8/23/1999
Garten, Lawrence M.	8/23/1999

Garten, Morris L.	8/23/1999
Ginsburg, Yale M.	11/13/2012
Ginsburg, Yale M.	8/17/2016
Gladstone, Leslie L.	4/22/2015
Glick, Susan M.	5/19/2009
Goldman Sacks Trust	8/30/2010
Goodman, Ann Karwacki	12/8/2000
Gordon, Jennifer J.	2/26/2001
Gordon, Solvin W.	2/14/2002
Gorgie, Betsy	9/1/2008
Grogg, Sheryl	3/4/2015
Gustafson, Cari Howlin	8/1/2016
<b>H</b>	
Heddleson, Linda K.	6/10/2002
Hendler, Michael G.	11/13/2012
Henninger, Laura L.	1/25/2007
Hill, Susan	1/21/2010
Horne, Robert M.	11/13/2012
Horne, Robert M.	6/25/2020
Howlin, Holly	7/11/2016
Hunt, John	12/6/2000
<b>I</b>	
-	
<b>J</b>	
Jack, Michael J.	8/23/1999
Jeffries, Mervyn	4/11/2000
Jenkins, Alfreda F.	5/19/2005
Judd, Reena G.W.	8/25/2008
<b>K</b>	
Kallina, Emanuel J., II	7/10/2012
Katcef, William M.	8/1/2000
Keidan, Gene Fiaccone	5/25/2012
Kelly, Marlene	4/15/2004
Knott, Lauren Brown	5/5/2023
Koepke, Kathleen M.	2/11/2000
Kolodner, F. Kirk	11/13/2012
Kohn, Robert	9/21/2021
Kohn, Thomas D,	11/13/2012
Kovens, Edward B.	5/10/2000
Krame, Evan J.	4/19/2012
Krauthamer, Harold	4/23/2015
<b>L</b>	
La Barbera, Jennifer	6/30/2008
Ladensohn, David A.	1/22/2008
Lalumia, Matthew P.	7/17/2002

Lalumia, Matthew P.	7/20/2015
Lamm, Jason	7/11/2008
Landsman Law Group	1/2/2024
Lang, Elisabeth	9/21/2021
Lehr, Michael E.	7/8/2013
Lemon, Robert E.	2/13/2002
Lenrow, Jay L.	11/13/2012
Leonard, Garrett F.	2/7/2009
Levine, Andrew	8/8/2000
Levy, Timothy J.	7/15/2007
Liu, Helen	3/3/2009
Lohr, Walter G. Jr	11/21/2008
Lurie, Jerald B.	11/13/2012
<b>M</b>	
Macuilla, Marybeth	6/6/2000
Mayberry, Pamela E.	2/14/2003
Mayer, Andrew C.	10/21/2016
Mayer, James L.	3/17/2016
Mering, Donald R.	4/12/2001
Mering, Donald R.	6/15/2004
Mering, Donald R.	10/25/2004
Mering, Donald R.	2/8/2005
Mering, Donald R.	3/18/2002
Merrill, Abel	3/19/2001
Merriman, Jack C,	1/4/2000
Miller, Mark L.	11/13/2012
Morgan, Gerald D.	11/20/1999
Morsberger, Anita	6/27/2000
Moses, Jerold A.	8/23/1999
Muir, Kenneth K.	9/5/2008
<b>N</b>	
Nash, Adam W.	1/20/2003
Nash, Caroline K.	10/28/2002
Noar, Mark	5/26/2006
Nolan, James J.	5/6/2015
Noren, Marc B.	11/13/2012
<b>O</b>	
Oakley, Larry C.	1/3/2011
O'Byrne, Mary E.	1/26/2022
O'Hare, Christopher	11/29/1999
Oring, Ira L.	8/23/1999
Ottinger, Marc	11/4/2004
<b>P</b>	
Parsons, George R. Jr.	7/8/1999
Pernick, Craig A.	9/14/2021

Person, C.J.	11/13/2012
Peterson, Gary B.	6/2/2003
Pettit, Rosser J.	3/6/2000
Pettit, Rosser J.	3/6/2000
Pettit, Rosser J.	12/19/2000
Pires, Lucia R.	10/20/2017
Plack, Martha	9/7/2007
Polt, Leslie J.	11/13/2012
Pope-Onwukwe, Karren	12/26/2010
Potter, James G.	6/13/2001
<b>Q</b>	
-	
<b>R</b>	
Radding, Andrew	11/13/2012
Randall, Terry L	3/21/2001
Rathman, Richard G.	4/12/2002
Robertson, Janet S.	5/25/2012
Roblyer, Michael R.	11/14/2012
Rodbell, Alice	11/17/2008
Rogers, Darryl S.	4/25/2006
Romanoff, Mark B.	9/9/2008
Rosenbaum, Susan	1/16/2001
Rosenberg, Henry	8/18/2008
Royack, Matthew D.	11/13/2012
Rudow, David B.	11/13/2012
Ryan, Patrick, The Law Offices of Patrick Ryan	5/3/2022
<b>S</b>	
Sall, Nancy	10/15/2008
Saltzman, Oren D.	11/13/2012
Schonberger, Steven D	3/7/2000
Schrebler, Roland M.	8/23/1999
Scott, Jeffrey D.	9/18/2001
Segev, Giora	7/20/1999
Sleigh, Stephen	9/21/2021
Snyder, Andrew	8/11/2008
Sotomayor, Randy	1/9/2003
Spatz, Marshall C.	9/5/2008
Spector, Harry G.	5/23/2007
Springs, Orlando W.	12/2/2005
Stanley, Jane Kheel	5/16/2000
Stanley, Jane Kheel	3/9/2007
Stone, Walter R.	11/13/2012
Sims, Jane Frankel	5/9/2012
<b>T</b>	
Tarbox, Lamont E.	9/5/2008

Taylor, Brian David	2/11/2004
Treft, Jennifer	02/26/2022
Tucker, Jack	3/7/2008
<b>U</b>	
Urban, Theodore W.	9/5/2008
<b>V</b>	
Versteegen, Nicola	8/10/2008
<b>W</b>	
Wainwright, Frank W.	11/20/2000
Ward, Matthew	02/26/2022
Washington, Geoffrey W.	11/13/2012
Weisse, Robin L	5/10/2012
Wen, Julia D.	11/1/2007
Whitehurst, Linda P.	6/13/2001
Whitehurst, William W., Jr.	8/10/2001
Wolff, Julia A.	4/7/2000
Willis, Lawrence W.	5/5/2000
Wunder, Paige A.	8/8/2008
Wilson, Neal J.	9/5/2008
Williams, Linda	8/19/2013
Wooden, Paul F.	12/16/2014
<b>X</b>	
-	
<b>Y</b>	
-	
<b>Z</b>	

Maryland Office of Financial Regulation

[www.labor.maryland.gov/finance/industry/prudentinvestor.shtml](http://www.labor.maryland.gov/finance/industry/prudentinvestor.shtml)