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IMAP 2018 PORTFOLIO MANAGEMENT CONFERENCE SPEAKER BIOGRAPHIES

2 AUGUST 2018

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Institute of Managed Account Professionals



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ANGELA ASHTON – EVERGREEN CONSULTANTS

Angela Ashton co-founded Evergreen Consultants and has 25 years experience in investment markets.

She has held senior investment roles at QIC, and was Head of Ratings at van Eyk Research and Lonsec. She holds a BSc, BEcon, MComm (Fin), is a Fellow of FINSIA and completed the CIMA qualification.



DAVID BASSANESE – BETASHARES

David is responsible for developing economic insights and portfolio construction strategies for adviser and retail clients. Prior to BetaShares, David was an economic columnist for The Australian Financial Review (AFR) for over a decade. Prior to the AFR,

David spent several years in the financial markets as a senior economist and interest rate strategist at Bankers Trust and Macquarie Bank. He started his career as a Commonwealth Treasury official, after which he spent three years as a research economist at the Organisation for Economic Cooperation and Development (OECD) in Paris, France.



TOM BIGNILL – MASON STEVENS

Thomas co-founded Mason Stevens in February 2010.

Having been involved with managed accounts since their infancy in Australia, Thomas has a strong vision for the growth and development of the managed accounts industry. Thomas and his team are committed to enhancing the investment and client service models of financial advisory practices in Australia.

Prior to Mason Stevens, Thomas was Head of Equity Market Services & Direct Clients at Next Financial, which was acquired by Wilson HTM in 2009. He started his career in financial markets in 1995 at Bankers Trust and held senior investment advisory roles at Merrill Lynch and Bell Potter.



RAF CHOUDHURY – STATE STREET GLOBAL ADVISORS

Raf is a Senior Investment Strategist within the Investment Solutions Group (ISG) for the Asia Pacific region.

Having joined SSGA in 2005, Raf initially joined the Sydney team as a Senior Portfolio Manager having transferred from London at the end of 2013. As a Portfolio Manager, Raf was responsible for managing Tactical Asset Allocation portfolios as well as a range of Absolute Return Funds and equity risk reduction strategies.

As an Investment Strategist, Raf engages with clients to identify complex investment issues, conduct needs-based analysis, and design targeted solutions supported by proprietary research and market viewpoints.



BIANCA De MELO – MACQUARIE BANK LIMITED

Bianca De Melo is the NSW state sales manager for the wealth Intermediary Team in Macquarie Banking & Financial Services division. Her team is focused on working with Businesses to transform their practices and enable their growth strategies. Her previous roles was Head of Managed Account Product at Macquarie. Bianca has over 15 years' experience at Macquarie, with the majority being spent in the managed account business in roles including Head of Managed Account Operations and Managed Accounts Business Manager.

Bianca is a responsible manager on the banks managed account license and delivers market knowledge and insights to drive the managed account development roadmap.



LUKASZ De POURBAIX – LONSEC INVESTMENT SOLUTIONS

Lukasz leads the Lonsec Investment Solutions Pty Ltd (LIS) business. LIS harnesses Lonsec's broad investment research and portfolio construction expertise delivering effective and efficient portfolio solutions to financial advisers. Lukasz is also chair of Lonsec's Asset Allocation Investment Committee and is a member of the Manager Selection and Direct Equities Investment Committees.

Prior taking the CIO role Lukasz was Lonsec's General Manager – Investment Consulting where he provided portfolio construction and manager selection advice to dealer groups, fund managers, super funds and private wealth institutions. Lukasz has over 18 year's industry experience commencing his research career at ING Australia where he was Research Manager.



ALEX DONALD – IRONBARK

Prior joining Ironbark Asset Management, Alex Donald was Head of Investment Sales for Colonial First State.

He was responsible for the distribution of Colonial's investment products in the Australian retail market, including research houses ratings, platform representation and the activity of the national sales team, as well as helping develop new products.

Alex began his career at Hill Samuel Asset Management in 1996 as an equities analyst on their global equities desk. He moved to Australia in 2001 and joined Zurich Investments where he helped restructure Zurich's retail sales business and as Head of Key Accounts was responsible for Zurich's research house, platform and dealer relationships.



NIGEL DOUGLAS – DOUGLAS FUNDS CONSULTING

Nigel Douglas is Chief Executive Officer (CEO) at Douglas Funds Consulting Pty Ltd which is an independent research firm that undertakes customised fund and client specific research projects as well as investment committee and non-executive director roles.

Mr Douglas has over 30 years financial markets experience with high level expertise in investment manager research, asset allocation and macroeconomics.



CESAR FARFAN – PERENNIAL

Cesar Farfan Head of Retail Distribution at Perennial, has over twenty years of industry experience, in the areas of funds management and capital markets. Cesar has extensive hands on experience dealing with investors and advisors in Australia and internationally – with acknowledged strengths in presenting wealth management solutions to financial planners, affluent and HNW investors, researchers, private banks, family offices, corporate and superannuation investment committees. Prior to joining Perennial Value, Cesar held senior distribution and product roles at Westpac, MLC, Macquarie Bank, IOOF and Westpac.



ANNE HAMIEH – VANGUARD

Anne Hamieh is the Intermediary Sales Manager - Northern with Vanguard Australia.

In this role, Anne is responsible for leading the sales strategy and the team responsible for the distribution of Vanguard's managed funds and exchange traded fund products to intermediaries in New South Wales and Queensland.

Prior to joining Vanguard in June 2014, Anne held senior distribution and business development roles at Centuria Capital, Wilson HTM and AMP. She has almost 20 years experience in the financial services industry.

Anne holds a Bachelor of Economics from Macquarie University, a Graduate Diploma in Applied Finance and Investment, and a Postgraduate Diploma in Management.



MATT HEINE – NETWEALTH

Matt started his career in financial services over 15 years ago when he joined Netwealth in July 2001. Matt's experience in sales, marketing and product brings a 'hands on' understanding to his role.

Matt has a passion for advice, superannuation, investment and technology and is a regular media commentator and presenter on these topics.



ALEX HONE – ATRIUM INVESTMENT MANAGEMENT

Alex Hone has a celebrated career in asset management and investment spanning 20 years, having worked with leading global firms in both Sydney and London. His experience has included establishing and developing funds management businesses that in turn developed global reputations for investment excellence.

Prior to joining Atrium Investment Management, Alex was a Portfolio Manager with Magellan Asset Management. Other senior roles have included working with CP2, a specialist global investment advisory and management firm, as well as Schrodgers Investment Management in London. Alex commenced his career in the Treasury division of the National Australia Bank.



REBECCA JACQUES, MC

Rebecca is a highly experienced senior investment specialist who has worked across many facets of the advice chain. Highly regarded for her strong commercial acumen, her persuasive personality and her ability to work with senior and multidisciplinary stakeholders, she has built her reputation through her passion for industry knowledge and her ability to transform complex information into simple and understandable key messages.

Rebecca is currently the CEO of SiResearch Solutions a specialist Research House focused on tailored Goals based Investment Research and the General Manager of AGBA which is an industry association set up to assist advisers in the implementation of goals based investment outcomes.



MICHAEL KARAGIANIS – PRIVATE INVESTMENT CONSULTING

Michael heads up the Private Investment Consulting team.

With more than 30 years in the financial services industry, Michael's experience includes consulting on asset allocation and multi-asset strategies. Michael has also managed multi-asset diversified and absolute return portfolios in Australia and overseas.

Michael joined NAB July 2010. Prior to NAB, Michael was Head of Asset Allocation at UBS Global Asset Management in Australia and Global Head of Asset Allocation and Investment Strategy at Aberdeen Asset Managers in London.

During his career, Michael has provided training to a wide range of clients and audiences including central banks, sovereign wealth funds, superannuation and pension funds, corporate investors, family offices, high net wealth and retail investors and their advisers, on topics related to the investment outlook, asset allocation and risk management.



NIK KRITIKOS – SAXO MARKETS

Nik Kritikos joined Saxo as Head of Institutional Sales Australia. He has over 20 years' experience in financial markets having started his career as a Sales Trader at Deutsche Bank after graduating from the University of Technology Sydney with a Bachelor in Business.

He joined JP Morgan in Sydney as the Executive Director for Global Cash Equities providing research, execution and marketing making facilities for key local and offshore clients for 9 years before being relocated to JP Morgan in New York and later followed by JP Morgan in Hong Kong



DR JEROME LANDER – PROCAPITAL

Dr Jerome Lander is Managing Director of ProCapital, a long established and highly successful boutique research and consulting firm. ProCapital advised clients are among the best performing in Australia. Jerome previously worked for several well-known institutions. Jerome was Chief Investment Officer of the \$12 billion Workcover Fund, which was the best performing institutional fund in the country in Mercer's database during Jerome's tenure. He was also a very successful Diversified Assets Portfolio Manager at Credit Suisse and Head of Manager Research for Van Eyk, which ran the no 1 rated Australian equity multimanager during his tenure.

Jerome is Portfolio Manager of the Dynamic Asset Consulting Goals Based Portfolios.



ANDREW LILL – MORNINGSTAR INVESTMENT MANAGEMENT

Andrew joined Morningstar Investment Management in 2014 as Chief Investment Officer.

Andrew is responsible for leading the Morningstar Investment team in Australia and developing Morningstar Investment Management's investment capabilities and thought leadership profile in the Asia-Pacific region. Andrew chairs the Asia Pacific Investment Policy Committee, and the Manager and Security Selection Sub-Committee. He is also a member of the Asset Allocation Sub-Committee and Portfolio Construction Sub-Committee.

Andrew has 23 years' experience in advising and managing institutional funds and investment teams in Australia, Asia, and the United Kingdom. Andrew worked most recently at AMP Capital Investors as Head of Investment Solutions in the Multi-Asset Group.



BRAD MATTHEWS – BRAD MATTHEWS INVESTMENT STRATEGIES

Brad Matthews has over 30 years experience in the finance industry and is a highly regarded investment strategist. After working in the money and foreign exchange markets in the mid-1980s, Brad held various economist roles at St. George Bank. He then moved into executive management positions at St. George, including being the Head of the Cards and ATMs division. Prior to establishing his own investment consultancy business in 2015, Brad worked in investment research at the AMP Group for 12 years, which included roles as Head of Research and Head of Investment Strategy for AMP Group financial planning licensees.

For the past 24 years, Brad has been editor of a newsletter known as “Plain English Economics”, which is read by secondary students studying economics.



DOMINIC MCCORMICK – INVESTMENT CONSULTANT

Dominic McCormick has worked in financial services and investment management for 33 years. He co-founded multi-asset and alternatives manager Select Asset Management in 2002 which was sold to OveVue Limited in 2014.

He is the Portfolio Manager of the Select Listed Investments Fund and the Select Real Return Fund. He also provides investment consulting services with a focus on portfolio construction, real return investing and listed funds.



SHERISE MERCER – MACQUARIE BANK LIMITED

Sherise leads the Macquarie Virtual Adviser Network (VAN), having been an integral part of the business since its inception over 7 years ago. VAN is an invitation-only community of entrepreneurial businesses owners of both financial planning specialists and multi-disciplinary firms, seeking scalable, sustainable growth. The VAN team connects business owners with IP, tools and expertise via a dedicated Macquarie business strategist, the Macquarie network of experts and a community of like-minded businesses who collaborate, learn together and share their perspectives.

Prior to joining Macquarie in 2011, Sherise ran her own business: Vital Projects - a strategic consulting and solutions company. Vital Projects specialised in taking new products to market, repositioning to gain competitive leverage and disruptive distribution strategies.

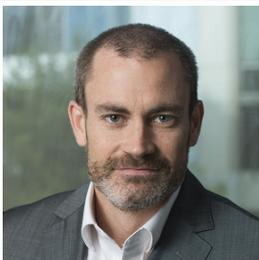


STEVE MERLICEK – ACTIVUS INVESTMENT ADVISORS

Steve is one of the longest serving Chief Investment Officers in Australia with more than 25 years investment experience across large Australian superannuation funds and institutional investors. Steve was Chief Investment Officer at IOOF, where he was responsible for the funds management division, comprising \$17 billion in investments.

Prior to joining IOOF, Steve was the Chief Investment Officer at Telstra Super for 10 years. During this time Telstra Super was consistently a top performing fund, and received numerous investment awards, managing over \$10 billion in assets.

He was recently inducted into The Rainmaker Selecting Super Awards Hall of Fame for his 25 years of service in the Superannuation industry. He also recently received the prestigious Lonsec 'Icon' award and the top ranking from ratings agency Chant West. He won the Multi-Sector Fund of the Year 2016 at the Lonsec/Money Management Awards and was finalist for the Asset Allocator of the Year category. Steve was named CIO of the Year in the inaugural 2012 National Achievement awards.



DAN MILES – INNOVA

Dan has led Innova since 2010, and is responsible for overall portfolio management of many of Innova's managed account portfolios. He also oversees the design and refinement of the company's quantitative modelling processes based on Innova's unique approach to managing investment risk. Dan is a Responsible Manager for Innova Portfolio Management and Fortnum Private Wealth.

Before being appointed to his current role, Dan was Chief Operating Officer at Fortnum Financial Advisers and, prior to that, held investment research positions with RI Advice Group and Genesys Wealth Advisers.

Dan is an active contributor to media discussions on issues affecting the investment and advice industries and has co-written a number of research reports on portfolio construction and risk management including in partnership with global actuarial firm, Milliman.



MARTIN MORRIS – PRAEMIUM

Martin has 26 years of industry experience spanning both Australia and the UK markets and held national roles in both product distribution and AFSL management. Martin has attained his MBA, is a Graduate of the Institute of Company Directors and is an accredited behavioural sales coach.

His role at Praemium includes the responsibility of mentoring and managing the distribution team to grow the Praemium platform and suite of solutions by helping advisers build more profitable, engaging and sustainable businesses.



TOBY POTTER – IMAP

Toby is Chair of the Institute of Managed Accounts Professionals (IMAP) the industry association for advisers using managed accounts, Managed Account operators and investment managers.

Toby has been involved in managed accounts since establishing one of the first managed account providers in 2004. He speaks frequently in industry and public forums about retail financial services.



DR TONY RUMBLE – THE WEALTH PARTNERSHIP

Dr Tony Rumble is Director Wealth Management at The Wealth Partnership, a self-licensed boutique wealth management group specializing in HNW and SMSF clients. Tony has a lengthy career in the financial services and taxation industry with over 30 years experience in the investment banking, taxation and funds management sectors.

Tony's special interest is in the use of ASX listed investments as a means of enhancing control, tax efficiency and cost reduction for HNW and SMSF clients, and is the founder of Australia's leading educational course for financial advisers, LPAC Online.



PAUL SALIBA – EVOLUTIONARY PORTFOLIO SERVICES

Paul is an investment specialist having joined the industry in the late 1990s with roles including Supervisory Analyst roles with Citigroup and Credit Suisse and within ANZ Asset Management.

Paul has also worked closely with financial planning practices and planners and their clients since 2008, Paul has worked in roles, such as, Chief Investment Officer of Lachlan Partners, Portfolio Manager at Mosaic Portfolio Advisers and Head of Equities & Portfolio Construction at IOOF.

At IOOF Paul was the investment manager for the Managed Account (and model) portfolios across the group with in excess of \$2.6billion under management.

He was also a responsible manager on the AFSLs of the MDA provider and two of the advice businesses.



JONATHAN SHEAD – STATE STREET GLOBAL ADVISORS

Jonathan Shead is a Managing Director of State Street Global Advisors and Head of Retirement Solutions, Australia. In this role he is responsible for creating innovative retirement investment solutions for the Australian market.

Jonathan's team will work with superannuation funds and financial advisers, delivering international best practice and new investment strategies to meet the evolving retirement needs of super fund members and self-managed investors. He has a Bachelor of Economics degree by Macquarie University and is a Fellow of the Institute of Actuaries of Australia.



CHARLES STODART – ZURICH INVESTMENTS

Charles joined Zurich in 2015 and has over 20 years experience in the financial services industry. Charles is responsible for providing support and investment commentary to financial advisers and investors of Zurich's managed funds.

Prior to joining Zurich, Charles was an Investment Analyst at Five Oceans Asset Management, covering Asian equities and global telecom stocks. Prior to this, he was a Fund Manager at Pengana Capital's Asian Equities Fund, with additional responsibility for Telecom and Technology sectors across Asia including Japan.



OLIVER TRUSLER – SCHRODERS

Oliver is the Investment Director for Schroders, based in Sydney. He is responsible for representation of local and offshore investment teams in the Australian market. With over 19 years of international experience in the investment management industry, he joined Schroders in August 2007 from Fidelity where he worked for 9 years in both Sydney and London.

Oliver holds the Chartered Financial Analyst (CFA) designation, is a Certified Investment Management Analyst (CIMA) and holds a Bachelor of Science with honours from Exeter University in the UK.



DAVID WRIGHT – ZENITH INVESTMENT PARTNERS

David Wright is a Managing Partner and joint founder of Zenith Investment Partners.

David has 27 years of investment industry experience, and is heavily involved in all aspects of the Zenith business, including maintaining strong fund manager and adviser networks, model portfolio construction and participation in client investment committee meetings.

Prior to establishing Zenith, David held senior positions within the financial services industry including IWL Ltd (Head of Research), an ASX listed company in which he was also a significant equity holder. David was instrumental in building and further developing IWL's managed investment research methodology and process and expanding the group's distribution of research to financial advisers. Other roles included Associate Director and Head of Managed Funds research at Lonsdale Limited and an analyst with the Advisor Group, a national financial planning group.
