



PMAR XX Conference

Speaker Biographies

Noreen D. Beaman

is the Vice Chair of Orion Advisor Solutions Board, and Chair of the Destinations Mutual Funds Board. After the merger of Orion and Brinker Capital, she served as President of Orion Advisors Solutions. Prior to that she served as CEO of Brinker Capital where she helped advisors and their clients build better outcomes for over 30 years. In addition, Noreen has received numerous accolades for her impact on the financial advice industry including *Philadelphia Business Journal's* Most Admired CEO, *Investment News's* 2017 Women to Watch and recognized in 2019 by *Pension and Investments* Best Places to Work in Money Management. Along with Chuck Widger, she was named the 2018 Greater Philadelphia's Entrepreneur of the Year in the financial services category by EY. Noreen received her Bachelor of Science from Saint Peter's University. As an industry leader, Noreen is passionate about supporting culture and diversity in the workplace. She is on the Executive Committee of the Money Management Institute and is a mentor for the Money Management Institute's Leadership Pathway, which connects members of the next generation with industry veterans to further enhance the mentee's knowledge and insights surrounding the investment advisory industry. She serves on St. Peter's University's Board of Trustees and is Chair of their Investment Committee.



Michael Beck, CIPM, CFP®, CAIA

is a Performance Measurement Vice President in Glenmede's Philadelphia office. Along with other members of the team, he provides performance measurement reporting, risk metrics, and helps maintain the firm's GIPS® compliance. He is also responsible for implementing new performance measurement software solutions for the firm. Prior to joining the Performance Measurement group at Glenmede Trust Company in 2016, Mr. Beck was employed by the National Netherlands Investment Partners, as a senior analyst. Mr. Beck was responsible for GIPS compliance and performance measurement projects at NNIP. He has also held various performance measurement roles at both SEI Investments and American Savings Bank. Currently, Michael is an active volunteer with the CFA Institute in the GIPS area. A resident of Philadelphia, Pennsylvania, Mr. Beck received a B.S. in finance from Susquehanna University and a Masters of Business Administration with distinction from Hawaii Pacific University.

Patrick Chism

serves on Vigilant's Management Committee and is responsible for Vigilant's Broker Dealer Solutions. Patrick works closely with the team of CCOs and Fin-Ops who handle Vigilant's clients; that team has over 100 years of Financial Services experience. Additionally, Patrick assists with the Broker Dealer Registration division within Vigilant. Patrick also serves as CCO Vigilant's Broker Dealer, among others, along with RIAs, and Mutual Funds. Patrick acquired twenty years of dynamic and diverse experience in the brokerage industry from various firms, including Prudential Securities, Merrill Lynch and UBS Financial Services. Patrick's responsibilities included compliance functions for a \$24-billion dollar complex with 70 plus financial advisors. His duties included oversight of all client accounts and operations. Furthermore, he was responsible for oversight of trading and marketing. Patrick also conducted specialized reviews for complex products and Financial Adviser activity. Most recently, Patrick was part of the Compliance Team at FS2 Capital Partners, LLC, the broker-dealer of Franklin Square Capital Partners and Franklin Square's Advisers. Patrick holds numerous FINRA Licenses: Series 24 (Securities Principal), Series 7 (General Securities Representative), Series 9 and 10 (General Securities Sales Supervisor), Series 66 (Uniform Combined State Law), Series 99 (Operations Professional), and life and health insurance licenses. Patrick earned his bachelor's degree from Texas A&M University and is involved with the local chapter of the Association of Former Students.



Jonnathan De Jesus, CFA

graduated from the University of South Florida with a B.S. degree in Finance. Since joining MTC in 2015, he has worked diligently to blend his unique data-focused experience with his approach to investment management. Recognized as an innovator in investment performance measurement, Jonnathan has presented at the PMAR North America conference to discuss how Python is incorporated in the investment operations supporting MTC's claim of compliance with Global Investment Performance Standards (GIPS).

Dan diBartolomeo

is President and founder of Northfield Information Services, Inc. Based in Boston since 1986, Northfield develops quantitative models of financial markets. He sits on boards of numerous industry organizations include IAQF and CQA, and is a director and past president of the Boston Economic Club. His publication record includes over forty books, book chapters and research journal articles. In addition, Dan spent eight years as a Visiting Professor at Brunel University, and has been admitted as an expert witness in litigation matters regarding investment management practices and derivatives in both U.S. federal and state courts. He became editor in chief of the *Journal of Asset Management* at the start of 2019.





Mark Elliott

is Director & Head of Performance and Attribution Solutions at SS&C Technologies and joined the firm in 2000. He currently has global responsibility for the Sylvan Performance and Attribution Suite. Prior to joining SS&C, Mark held various positions in corporate finance and investment analysis. Mr. Elliott holds an MBA from the University of Toronto, and a Bachelor of Commerce from Carleton University.

Shalonda Epps, CIPM

is Director of Portfolio Operations and Reporting at Xponance. She and her team are responsible for client on-boarding, portfolio measurement, trade settlement, compliance monitoring, portfolio transitions, proxy voting/corporate actions, client reporting, manager operational due diligence, composite creation and maintenance, GIPS standards verification and departmental compliance reviews, and audits. Shalonda is also responsible for maintaining investment policies and procedures for the multi-manager strategies. Shalonda is an equity owner, a member of Xponance's Management, and a voting member of the Investment Governance Committee. Shalonda began her career at Delaware Investments in July 1998, working in various client servicing roles. Toward the end of her tenure with Delaware, Shalonda was a marketing associate, providing marketing support to the firm's senior marketing and client services team members. In this role, Shalonda served as a primary liaison to the firm's International Equity clients and investment consultants. Shalonda is the Vice Chair of Xponance's non-profit organization, the A Good Measure Foundation ('AGM'). AGM supports individuals and organizations that educate youth and work to improve the lives of impoverished or marginalized women and children. Shalonda also serves on the Board of Philadelphia Youth Basketball. Shalonda earned a B.A. in Liberal Arts with a minor in Finance from West Chester University.



Jeffrey D. Fisher, Ph.D.

Professor Emeritus of Real Estate at the Indiana University Kelley School of Business where he was the founding Director of the Center for Real Estate Studies. He is currently a Visiting Professor at Johns Hopkins University and a member of the advisory committee to the Real Estate Finance and Economics Institute at EHL in Switzerland. He is also the Research and Educational Consultant to the National Council of Real Estate Investment Fiduciaries (NCREIF) and president of the Homer Hoyt Institute. Dr. Fisher has published extensively in the leading academic real estate journals and is the coauthor of Real Estate Finance and Investments which is currently in its 17th Edition and used at universities throughout the world.



Claude Giguère

is president and co-founder of Robust Technologies, a company offering software solutions specialized in performance measurement, performance attribution, benchmark customization, risk analytics and GIPS composites. Since 2006, prestigious investment management firms have relied on Robust Technologies to handle their performance reporting requirements. Considered as the best-of-class solution, Robust Technologies is renowned for its expertise and calculation methodologies that provide accurate and insightful results for the most complex and challenging portfolios. Mr. Giguère has 34 years of experience in developing financial software applications including 24 years specializing in performance and attribution. His expertise in performance and attribution is recognized worldwide. He presents regularly at conferences in Canada, USA and Europe. He is also member of the advisory board of *The Journal of Investment Performance Measurement*. He assisted, as a consultant to the CFA Institute, in the development of the CIPM program (Certified in Investment Performance Measurement), and co-authored the CIPM Level II Reading #7 on Fixed Income Attribution and collaborated with the Paris-based reflection group on fixed income attribution (“G.R.A.P.”). Prior to co-founding Robust Technologies, Mr. Giguère worked at Financial Models Company (FMC) for 13 years acting mainly as the product manager for their SYLVAN performance and attribution software.



Sean P. Gilligan, CFA, CPA, CIPM

is the Founder of Longs Peak Advisory Services. Sean has over 20 years of experience in the investment industry, with the last 16 years focused specifically on investment performance and GIPS compliance. From the front office to the back office, Sean has seen it all and has a deep understanding of how investment firms and asset owners operate. Sean is passionate about helping firms understand complex topics. With his unique ability to breakdown complicated topics into simple, digestible terms, Sean strives to make GIPS compliance easy enough for any firm in the world to comply.

Pamela Grossetti

is of counsel in K&L Gates' Boston office. Pamela practices in the area of investment management and securities law, and focuses on advising investment advisers, registered and unregistered investment companies and other financial service providers on all legal and regulatory aspects of their operations. Pamela counsels clients on various regulatory and compliance issues including performance advertisement review for investment advisers and broker-dealers. Pamela also assists in the formation of and the provision of ongoing advice to domestic and offshore unregistered investment companies. Prior to joining the firm, Pamela was a chief compliance officer at an SEC-registered investment advisory firm. In addition, Pamela was an associate at the firm from 2007-2015 in the Boston office and a summer associate in 2006.



John M. Longo, PhD, CFA

Dr. Longo is a Professor of Finance & Economics at Rutgers Business School and Chief Investment Officer and Portfolio Manager for Beacon Trust, a registered investment advisor with approximately \$4 billion under management. At Beacon, he is part of a team that manages a series of mutual funds and separately managed accounts. Beacon is a subsidiary of Provident Financial Services (NYSE: PFS), founded in 1839. Dr. Longo is also a Visiting Professor of Finance at EMBA Global Asia – the joint international Executive MBA Program of Columbia University, London Business School, and The University of Hong Kong. He is the bestselling author of [The Art of Investing: Lessons from History's Greatest Traders](#), published by TheGreatCourses.com. (The book peaked as the 26th bestselling book out of roughly 200,000 titles on Audible.com) and [Buffett's Tips: A Guide to Financial Literacy and Life](#) (Wiley, 2020). He has won a total of four awards for teaching and research excellence at Rutgers Business School. Dr. Longo has appeared on CNBC, Bloomberg TV, Bloomberg Radio, ABC News, Fox Business, BBC World, wsj.com (video), GreatInvestors.tv, The (Ron) Insana Quotient, and several other programs. He has been quoted in *The Wall Street Journal*, *Barron's*, *The New York Times*, *Los Angeles Times*, *Thomson Reuters*, *Dow Jones MarketWatch*, *U.S. News & World Report*, *CNBC.com*, *The Harvard Crimson*, *The Chicago Tribune*, *Yahoo! Finance*, *Business Insider*, *The Star-Ledger*, *Hedge Fund Alert*, *FundFire*, and dozens of other periodicals. He led Rutgers students to a personal visit with Warren Buffett in Omaha, Nebraska on four separate occasions. Previously, he was a Vice President at Merrill Lynch & Co., Inc. and served on the Advisory Board of Bloomberg's educational subsidiary, The Bloomberg Institute.



Richard E. Mailhos

is a Senior Manager and Investment Performance Practice Lead at Meradia, a global leader in consulting for investment operations and technology. Richard has over 25 years of experience in the financial services industry with extensive consulting and project expertise ranging from operational and control reviews to global portfolio management platform deployments. Prior to joining Meradia, he spent two years within BNY Mellon's Middle-Office Outsourcing division, and 16 years at Eagle Investment Systems. While at Eagle/BNYM, Richard was responsible for product management, implementations and architecting solutions that drove programs around the world at asset managers, insurers, asset owners, sovereign wealth funds, and multi-client servicing platforms. Through his work with this broad mix of clients, Richard introduced the concept of the Performance Book of Record (PBOR) to the industry.



George Mar

Archer's Chief Information Security Officer, is responsible for maintaining and enhancing Archer's security posture. Prior to joining Archer, George was the Chief Technology Officer/Head of Operations for Global Thematic Partners and held various IT managerial roles in Deutsche Bank, Citi and Lord Abbett. George received his BS at NYU Stern School of Business. George has contributed to several industry publications/panels and continues to be an active contributor.



Arun Muralidhar, Ph.D

is Founder of Mcube Investment Technologies LLC and Founder and Client CIO of AlphaEngine Global Investment Solutions. He is the author of Fifty States of Gray: An Innovative Solution to the Defined Contribution Retirement Crisis, Investments and Wealth Institute, 2018. His primary focus is on dynamic (intelligent) beta and currency management and how clients can get paid to manage risk. Arun has written extensively on pension reform (with Nobel Laureate Prof. Franco Modigliani), financial innovation (with Nobel Laureate Prof. Robert Merton), asset allocation, risk-adjusted performance/attribution and portfolio/currency management. He is one of four members selected to serve on the Academic Advisory Board of PGGM, NL. He serves as an Expert Advisor to the World Economic Forum's Retirement Investment Systems Improvement Project, and the Strategic Retirement Advisory Council for the Investments & Wealth Institute (formerly IMCA) for their Retirement Management Advisor (RMA) designation. He serves on the Advisory Board of *The Journal of Performance Measurement*. He was also adjunct professor of Finance at George Washington University and Academic Scholar at Georgetown University's Center for Retirement Initiatives. He holds a Ph.D. in Managerial Economics from the MIT Sloan School of Management, and a B.S. from Wabash College.



Ashley Reeves, CIPM

is a Senior Vice President and heads The Spaulding Group's Global Investment Performance Standards (GIPS) verification practice. She has over 20 years of industry experience, with 16 directly involved in GIPS standards verifications. She was most recently with Total Performance Solutions LLC, where she provided a variety of performance-related services including systems selection and implementation, operational reviews, and GIPS standards consulting and support. Previously, Ashley spent more than seven years working at Vincent Performance Services LLC, where she provided consulting and verification services to clients in North America, Europe, Asia, and Australia. Ashley also has extensive experience working for an asset manager: Western Asset Management Company, one of the world's leading fixed income managers. She was the Supervisor of Performance where she managed the team that was responsible for, on a global basis, the performance measurement function, including the calculation, review, and analysis of performance and risk measures, performance reporting, and GIPS standards compliance. Ashley began her career at Deloitte, providing audit and verification services to Southern Californian clients. She has presented at GIPS standards workshops, and has spoken on the GIPS standards and performance-related topics at various conferences throughout the United States. She has been an advisor to CFA Institute serving on the CIPM Examination Review Panel intermittently since 2017. In addition, she serves on the GIPS Standards Interpretations Subcommittee. Ashley received her B.A. in Business Economics from the University of California, Santa Barbara.





Jesse Reyes

As the founder of J-Curve Advisors, LLC, Mr. Reyes is widely regarded as one of the leading experts on performance measurement and quantitative research of the venture capital and private equity industry. Mr. Reyes has previously served as Chairman of the Global Investment Performance Standards (GIPS) committee on private equity performance presentation standards. He has been on the Advisory Board of the Private Capital Research institute. He also is a Visiting lecturer at Cornell's Johnson Graduate School of Management, where he teaches an over-subscribed class on topics in institutional private equity investing. He served as a Managing Director in Bear Stearns Private Funds Group providing advisory, due diligence, and fundraising services to GPs and LPs. As former global head of research at Thomson Venture Economics he developed private equity benchmarking and research methodologies and analytical tools which have become industry standards. He has also served as an Educational Board Member of the Kauffman Fellows program.

Debi Deyo Rossi, CIPM

is President of Kyza Performance Consulting, LLC. She has over 30 years' experience in the investment performance measurement industry. Debi is a member of CFA Institute and CFA Society Boston. From 2011 to 2016, she served on the CIPM Advisory council, serving her final year as Committee Chair. From 2006 to 2011, she served on the USIPC (United States Investment Performance Committee). She was also a member of the Performance Measurement Forum. Debi currently serves on the CFA Society Boston Programs & Education Advisory Council. She is also on the Advisory Board of *The Journal of Performance Measurement*. Her involvement with participating on various industry Boards continues at the Community level. Debi is an elected Parks & Recreation Commissioner for the Town of Medway, currently serving as Chair. She has also served as Treasurer for Medway Youth Lacrosse and Medway Pop Warner. In addition, she has coached the youth cheer team and has taught CCD at St. Joseph's Parish. Prior to building Kyza Performance Consulting, Debi was a Principal/Director and Senior Performance Specialist with Turner Investments of Berwyn, PA and a performance analyst with Independence Capital Management, Inc, a subsidiary of Penn Mutual. Her experience with the GIPS Standards started with the creation of the AIMR-PPS. She has extensive experience with implementing and using various accounting and investment performance analysis systems, including StatPro, PORTIA, CAPS, Xamin, and InvestOne.





Jesse R. Santos

Managing Director, is a member of State Street's Alpha Platform Management team, which supports the overall product and business strategy of the Alpha Platform. State Street Alpha is one of the industry's first front- to-back asset servicing platforms that helps institutional investment managers make better decisions by bringing together data and analytics from across the investment lifecycle. Mr. Santos works across product management, implementation, and technology leads to drive the day-to-day execution of the Platform's long-term strategy. Prior to joining State Street, Jesse was the Director of Data Analytics and Business Intelligence for a \$1T+ global asset manager. In that capacity he was responsible for the enterprise data strategy, architecture, and operations to support executive business and product specific reporting. Prior to that role, Jesse had spent the previous 10+ years in a variety of management, technology, and operations consulting roles spanning global custody, asset servicing, asset management, hedge fund, private equity, and asset owner clients globally. Jesse received his Bachelor of Science degree from the University of Massachusetts – Amherst, Isenberg School of Management. Jesse has also served on several industry and vendor specific client advisory boards as well as the management committees of several non-profit organizations in the Boston area including holding Chairman Emeritus status for the Massachusetts Society for the Prevention of Cruelty to Children (MSPCC) Young Executives committee.

John D. Simpson, CIPM

has been with The Spaulding Group since 2005, where he regularly conducts GIPS and non-GIPS verifications, as well as GIPS examinations. He also teaches classes on performance measurement, attribution, risk, and GIPS, and conducts software searches, operations, and technology related consulting assignments. John is a regular speaker at industry conferences and society programs. He is the co-author of The Spaulding Group's Guide to the Performance Presentation Standards (TSG Publishing, 2012) and has written numerous articles. John crafted and conducted The Spaulding Group's CIPM prep courses (no longer offered). John is currently a member of the United States Investment Performance Committee's After-Tax Working Group, working on recommendations for firms that present after-tax performance results. Prior to joining The Spaulding Group, John spent 20 years with Integrated Decision Systems, a New York-based software vendor that provided portfolio accounting and performance measurement solutions to the investment industry. He was the Product Manager for their GIM Performance and CALiPER investment performance & analytics systems. John was responsible for the enhancement "road maps" for the performance systems with the primary responsibility of aligning the product's goals with customer needs and market demands. He also acted as chief business analyst in specifying performance analytics and portfolio accounting functionality. John holds a BS in Applied Mathematics from UCLA, where he was a member of their 1987 NCAA national championship volleyball team.





David D. Spaulding, DPS, CIPM

has been a thought leader in our industry for more than 30 years, and has an in-depth experience with every major asset class and just about any circumstance. He is arguably the #1 authority on performance measurement. Dave has over 40 years' experience in management and technology, including over 30 years in the financial sector. He has conducted training classes for our clients, the CFA Institute, as well as local societies for 20 years. He has written four books, and been co-author and/or editor of five more. He has also written numerous articles for various industry publications. Dave has served on a variety of industry committees and working groups. He earned a BA in Mathematics from Temple University, an MS in Systems Management from the University of Southern California, an MBA in Finance from the University of Baltimore, and a doctorate in Finance and International Economics from Pace University.

Gustavo Bernal Torres, CFA

is the Head of ESG Integration at Invartris Consulting, where he helps asset owners and asset managers include ESG factors in investment analysis, decision making, and operational processes. Prior to Invartris, he founded TerraBlanca Impact Capital, an impact investment fund in Latam and was the inaugural recipient of The Rockefeller Foundation & Kellogg School of Management Sustainable Investing Fellowship. Gustavo has also worked as an investment management consultant in Singapore and as a fixed income portfolio manager. He holds an MBA from the National University of Singapore (NUS) and a BBA from the National University of Colombia.

