



PMAR XXII Conference Speaker Biographies

Susan Agbenoto is Director of Investment Performance at Opus Investment Management. She has worked in investment performance for over 20 years, responsible for the investment performance measurement and attribution functions at the firm. She received her CIPM designation and coordinates all aspects of GIPS® compliance including maintaining appropriate policies and overseeing the annual GIPS verification. She is also responsible for monitoring portfolio compliance to client guidelines. Susan is a thought partner in identifying opportunities to enhance compliance, benchmark, performance related risk measures and performance reporting. She also monitors industry and peer trends as related to best practices and obtaining relevant market intelligence. Susan is a speaker at conferences and obtained her MBA from Babson College, MA. She obtained a Doctorate of Ministry as a hobby and is in the process of publishing her first book.

Frances Barney is the Head of Global Risk Solutions and Institutional Accounting Operations within BNY Mellon Asset Servicing. She has more decades of industry experience than she will admit to, most of it in performance and risk analytics services. Frances received a B.A from Yale University, and an M.B.A. from The Wharton School of the University of Pennsylvania. Frances is an active volunteer with the CFA Institute.

Michael Beck, CIPM, CAIA, CFP® is a Performance Measurement Vice President in Glenmede's Philadelphia office. Along with other members of the team, he provides performance measurement reporting and risk metrics and helps maintain the firm's Global Investment Performance Standards (GIPS) compliance. He is also responsible for implementing new performance measurement software solutions for the firm. Prior to joining Glenmede, Mr. Beck was employed by the National Netherlands Investment Partners as a Senior Analyst. In this role, he was responsible for GIPS compliance and performance measurement projects. He has also held various performance measurement roles at both SEI Investments and American Savings Bank. Mr. Beck received a Bachelor of Science degree in finance from Susquehanna University and a Master of Business Administration degree, cum laude, from Hawaii Pacific University. He also holds a CPA certificate from the state of Delaware. Mr. Beck is a member of the Global Investment Performance Standards Interpretations Subcommittee which acts as a forum for understanding technical issues that investment management firms face when complying with the GIPS standards.

Brian Buzzelli is an accomplished leader in financial data management with more than 27 years of experience in the financial services and asset management industry. He has a deep background in data strategy, quality, architecture, governance, and data management operations. Brian has championed data quality and pre-use data validation, allowing investment and operation professionals to focus on their core responsibilities. His innovative approach drives a data-driven culture, treating data as an asset that involves leveraging manufacturing techniques to engineer a robust data quality control framework, ensuring accuracy and precision. Brian's strategic focus revolves around driving data and architecture transformation in investment management operations, simplifying data architecture, reducing operational risk, and increasing overall operational efficiency. His commitment to data quality and control frameworks empowers investment management flexibility, supporting enterprise data integrations, new products, and services, and aligns data efficiently with vendors.

Stephen Campisi, CFA began his academic career with degrees in music, focusing on theory, performing and education. Later shifting to investments, he gained first-hand experience in several aspects of the investment process, with responsibility for data analysis, systems development, risk analytics and performance evaluation. He then spent over twenty years managing investment portfolios in both liability-driven and total return contexts for clients such as insurance companies, pensions, endowments and foundations. He also led the institutional investment guidance group at a major financial institution, introducing innovations in asset strategy, true goals-based investing, alpha-diversifying investment selection and monetary measures of performance evaluation. He served for over a decade as an adjunct professor at the graduate level and as an instructor in the CFA Review program. He authored numerous publications on various investment-related topics and is a frequent conference speaker. His ongoing research continues to focus on innovations in performance evaluation, risk analysis, investment strategy and portfolio construction.

Harald Collet is the CEO and Co-Founder of Alkymi, the first complete business system to manage unstructured data and turn it into actionable information. Built on cutting edge AI and utilizing the latest large language models, Alkymi empowers financial services companies to automate high-value data workflows in private markets, client onboarding, and other operations. Harald has over 22 years of business-building experience, a timespan in which he has brought over 10 new products to market across various roles and entities and led the acquisition of 2 software companies as general manager at Bloomberg LP. He is a First Lieutenant in the Danish Army and has a B.A. from Yale University.

Matt Deatherage, CFA, CIPM joined Longs Peak in the fall of 2019 and has over nine years of experience working specifically with the GIPS standards and investment performance. Six years as a verifier has made Matt a seasoned GIPS and performance consultant. He is exceptional at client service and leading clients through their GIPS and investment performance engagements on behalf of Longs Peak Advisory Services.

Lance Dial is a partner and a member of the Asset Management and Investment Funds practice. Lance has experience advising asset managers and broker-dealers in all areas of the business. He has worked with all product types, including mutual funds, ETFs, money market funds, private funds, and bank-maintained collective pools. In addition, Lance advises clients on compliance and regulatory matters under the Investment Company Act of 1940, the Investment Advisers Act of 1940, ERISA, and other related federal securities laws. Lance has significant experience with the regulation of marketing and advertising of investment products, integration and marketing of Environmental Social and Governance (ESG) investment products and trading and market structure issues. He has worked extensively on regulatory policy matters with various financial services regulators, including the US Securities and Exchange Commission, US Department of Labor, Internal Revenue Service, and US Department of Treasury.

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 including 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.

George (G.R.) Findlay, CIPM is an Assistant Vice President of State Street Global Advisors Performance Oversight team. His primary responsibility is to ensure SSGA's GIPS® compliance globally. Mr. Findlay has been with State Street for over 19 years where he has held various positions during his tenure including spending many years working in State Street's Investment Analytics Client Service Relationship team. Mr. Findlay has over 17 years of Investment Performance and Analytics experience including over 8 years working on GIPS® compliance for SSGA. Mr. Findlay earned his Bachelor of Science degree in Business Administration from the University of Vermont and his Master of Science degree in Finance from Boston College. He is also a current member of the CFA Institute's GIPS® Standards United States Investment Performance Committee (USIPC).

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 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.

Dan Golosovker is Head of Insights-Analytics at Addepar, based in New York City. Dan is responsible for developing and producing insights and analytical products that enable clients to make more informed investment decisions. Prior to joining Addepar, Dan worked for Bridgewater Associates, a leading hedge fund where he held a variety of roles including overseeing client reporting/analytics and post-trade portfolio monitoring. Dan earned his BA in Mathematics from Amherst College and his MSc in Management from the London School of Economics.

Thayne Gould is a Director at Vigilant and is responsible for developing, testing, and monitoring compliance programs for investment advisers, broker-dealers, and registered investment companies. He has extensive knowledge and application of the Investment Advisors Act of 1940, Securities Act of 1933, and state securities laws and serves or has served as Chief Compliance Officer for a number of Advisers that manage private wealth, private equity, hedge funds, and other private funds. Thayne has over 25 years of investment management industry experience with firms such as T. Rowe Price and PNC Capital Advisors. His duties have included product management, marketing, and compliance functions and he has been responsible for oversight of both broker-dealer and investment adviser activities for a \$1-trillion fund complex, 700-person marketing and distribution organization, and the activities of a \$50-billion institutional asset manager. He has significant experience with various SEC and state filings, supported examinations, and been point of contact for the Staff and other regulators. Thayne holds the FINRA Series 24 (General Securities Principal), Series 53 (Municipal Securities Principal), Series 7 (General Securities Representative), Series 6 (Investment Company and Variable Contracts Representative), Series 66 (Uniform Combined State Law), and Series 63 (Uniform Securities Agent State Law). Thayne earned a Bachelor of Science in Economics from Towson University and a Master of Business Administration from Loyola University Maryland.

Amy Harlacker is the Head of Operations at Commonfund. She oversees the delivery of operational and investor services to outsourced CIO clients and fund investors which includes the management of valuations and financial and regulatory reporting for Commonfund funds. As a member of the Commonfund OCIO Executive Group, Amy is responsible for collaborating with members of the team to provide operational leadership, direction and support during the implementation of the organization's strategic plans and initiatives. She has also held a series of roles within the Commonfund organization across the Financial Operations, Client Service and Information Technology groups. Prior to joining Commonfund, Amy was a business analyst at Energy East Corporation. She serves on the Board of Directors of the Aspetuck Land Trust and 203 Squash. Amy holds an M.B.A. from Rensselaer Polytechnic Institute and a B.S. in Civil Engineering from Lehigh University.

Christine Iannacone, CIPM is an Investment Senior Vice President at Prudential Financial. Christine is the Head of Investment Performance Reporting and Analysis within the Chief Investment Office. She is responsible for performance analysis, client reporting, and marketing presentations for the investments of the general account and clients of Prudential Select Strategies LLC. Prior to joining Prudential, Christine was with Goldman Sachs Asset Management, where she was a Vice President in the Alternative Investments & Manager Selection Group. She managed the Performance Analytics and Client Reporting teams for the Hedge Fund Strategies Group. Previously, she worked in Fixed Income Investment Performance and Portfolio Administration where she managed the performance team. Prior to joining Goldman Sachs, she worked as a securities analyst at SEI Investments. Christine received a Bachelor of Science in Economics from The Pennsylvania State University and a Master of Business Administration with a concentration in Finance from LaSalle University. She is an active volunteer for the CFA Institute. Christine serves on the advisory board of *The Journal of Performance Measurement*.

Todd Juillerat, CFA has deep functional expertise from more than 25 years of experience with investment performance measurement and analytics. He has held global roles for firms such as Northern Trust, State Street, Invesco, and J.P. Morgan in addition to having provided verification and consulting services for TSG (formerly known as The Spaulding Group). Todd has been actively involved in various industry associations, including his membership on CFA Institute's GIPS® Executive Committee and the advisory board to *The Journal of Performance Measurement*®, in addition to having spoken at dozens of industry conferences and events. He holds a bachelor's degree in business administration from Wake Forest University.

John M. Longo, PhD, CFA Dr. Longo is a Distinguished 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 also spent 7 years as 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*, *Yale Daily News*, *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.

Tina Madel, CFA is an investment operations expert who guides clients through complex business transformations. With over 30 years of industry experience, Tina has mastered the ability to drive technological change while meeting key business objectives. She deeply understands the investment operations lifecycle, spanning client reporting, data cleansing, performance measurement, and client portal implementations. Tina has worked with many registered investment advisors, trust companies, asset managers, and multi-family offices throughout her career. She brings a unique perspective to vendor selections, having worked at both technology systems and wealth management companies. Tina earned a Masters in Business Administration at Wilmington University and a B.S. in Finance at Goldey Beacom College in Delaware. Tina is a pet enthusiast and enjoys spending her free time playing with her black lab. As a hobby, Tina uses her artistic skills and love of animals to create custom animal portraits for friends and family.

Jose Michaelraj, CIPM, CAIA consults in solving performance operations & technology problems for asset managers, asset owners, and custodians. Jose has worked on dozens of performance transformation projects to reduce manual workarounds and increase operational efficiencies. A combination of process, data, and technical skills helps him define solutions for public and private market asset classes that include complex derivatives. A recognized thought leader, Jose has presented at conferences, led round tables, published papers in *The Journal of Performance Measurement*, and contributed articles to CAIA blogs. Attempting to maximize business value while reducing operational risk is his favorite pursuit. Jose earned a Bachelor of Engineering in Computer Science from Vellore Institute of Technology in India and a Masters of Business Administration with a specialization in Finance and Information Systems from XLRI in India. He also holds his Certification in Investment Performance Measurement (CIPM®) and Chartered Alternative Investment Analyst (CAIA®). When Jose is not in the office he enjoys reading philosophy and writes about it at insearchofi.com

John Norwood is a principal at Norwood Consulting, the producer of CompositeBuilder, a powerful suite of tools to help achieve and maintain GIPS® compliance.

Josh O'Brien, CFA leads Strategic's Operations team. He is responsible for overseeing all of the operational aspects of Strategic's investment process, including trading related activity; position and cash management; custody oversight; and investment accounting, performance calculations, Global Investment Performance Standards (GIPS®) Compliance, and client reporting. Prior to this role, Josh was responsible for managing the proper execution of investment decisions across client portfolios; assessing existing processes and workflows within the investment process; and recommending and overseeing the implementation of process and technology enhancements. He began his career at Strategic as an Investment Performance Analyst. Prior to joining Strategic, Josh oversaw residential development projects in the real estate industry. He holds an M.B.A. from Georgetown University's McDonough School of Business, a B.S. in Finance & International Business and a B.S. in Spanish from Pennsylvania State University. Josh is a CFA charterholder and a member of the CFA Society of Washington, D.C.

Steve O'Brien is an executive VP and Co-Head of Enterprise Solutions for Rimes Technologies. Steve joined Rimes in 2000 and is part of a global team of Enterprise Consultants who offer implementation expertise and best practice knowledge across the complete range of Rimes Enterprise data management services including the Rimes powerful Investment management platform. He has 28 years of experience in the data management industry and holds a BSc (hons) in Mathematics, Operational Research and Economics from the University of Essex.

Mark Parker is Managing Director of State Street's Investment Risk and ESG services business line. Head of client engagement, product commercialization and contributing product strategy committee member. Starting his career as an Electrical Engineer, shifted into a now 20-year career in the financial services industry with the last 10 at State Street. Prior experience at FactSet Research Systems and SS&C Technologies. Mark holds an M.B.A. from Northeastern University and a B.S. in Electrical Engineering from Rochester Institute of Technology.

Debi Deyo Rossi, CIPM is President of Kyza Performance Consulting, LLC. She has over 25 years of experience in the investment performance measurement industry. Debi is a member of CFA Institute, CFA Boston Society, and CIPM association. She has served on the CIPM Advisory Committee and the USIPC (United States Investment Performance Committee). Debi currently serves on the CFA Boston's Education & Program Advisory Committee and the Advisory Board of *The Journal of Performance Measurement*.

Mark Rothermel, CIPM is Director and VP within the Investment Performance Analysis Department at T. Rowe Price. He runs the operations and delivery functions within the group. His teams' focus on the production, auditing and distribution of performance returns, holdings-based stats and allocations, and attribution on all firm products including, but not limited to 40 Act Funds, separate accounts, SICAVs, OEICs and composites in support of the Investment Management team and reporting function. Mark's teams also are responsible for the data management function within the department, providing oversight and business support to the data flow ingestion into and between various systems and exposing the content via curated distribution mechanisms. He has earned the CFA's Investment Foundations® certificate. Mark has 16 years of experience in the performance space.

Alex Shafran, CFA is Senior Vice President, director of performance and client reporting at Cohen & Steers. He has more than 20 years of industry experience. Prior to joining the firm in 2017, Mr. Shafran was with AllianceBernstein, where he oversaw post-investment portfolio analytics across all products in support of client servicing, marketing, risk and portfolio management. Previously, he was part of the global portfolio strategy group on Bernstein's sell-side research team, and held project and operations management positions within Bernstein's fixed income department and was part of the investment planning team within Bernstein's wealth management division. Mr. Shafran is a regular speaker at the Performance & Risk industry conferences. He holds an MA from New York University and is based in New York.

Cynthia Shaw-Pereira is Vice President and Head of Asset Owner Solutions at CIBC Mellon. Cynthia is responsible for establishing strategic priorities for CIBC Mellon's asset owner segment and services for institutional investors active in the Canadian market. In addition, Cynthia works closely with sophisticated clients to understand, identify, and develop new solutions, helping shape CIBC Mellon's delivery of solutions today and build for the future based on clients' needs. She has nearly 20 years of experience in asset servicing. Cynthia's previous roles across the BNY Mellon global enterprise include client solutioning of performance and risk analytics products and services, and advising on the Environmental, Social and Governance space in the Canadian market. Cynthia holds a Bachelor of Commerce degree from the University of Toronto, and certificates in Investment Performance Measurement (CIPM) and ESG Investing from the CFA Institute.

John D. Simpson, CIPM has been with TSG 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 TSG's Guide to the Performance Presentation Standards (TSG Publishing, 2012) and has written numerous articles. John crafted and conducted TSG'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 TSG, 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 is the founder and CEO of TSG. He 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 recognized as an authority on performance measurement. Dave has over 40 years' experience in management and technology, including over 35 years in the financial sector. He has conducted training classes for our clients, 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, and is currently a member of the Canadian Investment Performance Council (CIPC), which he joined immediately after serving on the United States Investment Performance Council (USIPC). 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.

Shankar Venkatraman, CFA heads the Investment, Performance and Client Reporting teams at American Century. Shankar joined American Century in 2020. Previously, he was with BNY Mellon for four years where he led the development of data and digital capabilities for the asset servicing division. Prior to that Shankar was at Citi for 16+ years where he was the global head of performance and risk analytics for its Custody and Fund Services/Investor Services business. Prior to this position, he managed technology, created business intelligence solutions, business process reengineering, etc., across the financial services value chain including Asset Management, Cash Management, Investment Banking, Sales & Trading and Research. Shankar is very active within the financial services industry. He is the vice chair of the Institutional Asset Management Committee at New York Society of Security Analysts and a regular speaker at Performance and Risk forums. Shankar has an MBA from Stern business school, New York University and is a CFA charter holder. He is also FRM certified by the GARP (Global Association of Risk Professionals).

Patrick Warren His research covers a broad range of topics across private market strategies, including performance, cash flow management and risk. He previously worked in commodity research at IHS Markit, and before that, as a research affiliate at MIT studying firm behavior. He holds a master's degree from Boston University and a bachelor's degree from the University of Washington, both in economics.