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Speaker Biographies

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.

Matt Deatherage, CFA, CIPM joined Longs Peak in the fall of 2019 and has over 7 years of experience working specifically with the GIPS® standards as a verifier and consultant. Having worked for the largest verification firm for 6 years, he has the experience necessary to help firms of all shapes and sizes implement the GIPS standards. Matt is a seasoned GIPS consultant and is exceptional at client service and leading teams. His ability to coach our team and lead our clients through their GIPS engagements is unparalleled.

Jonnathan De Jesus, CFA, CIPM leads Members Trust Company's (MTC) Operations team. He brings over eight years of experience to this role, leveraging his expertise to integrate current market conditions and trends into effective investment strategies for all client portfolios. Jonnathan is a published author in *The Journal of Performance Measurement* and spearheaded initiatives like MTC's first independent verification of its claim of compliance with GIPS standards and the firm's first robo-investing partnership, demonstrating a commitment to innovation and client focused partnership with MTC's partners. Jonnathan received a BS in Finance from the University of South Florida.

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.

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.

Jocelyn Gilligan, CFA, CIPM is co-founder, keeper of employee experience, and accountability guru at Longs Peak Advisory Services. She has 13 years of experience in the financial services industry. She is passionate about client service and project management and has worked with some of the world's largest financial institutions. After serving as a Manager at Ernst & Young, Jocelyn switched gears to become a mother, but her heart could never fully leave her professional career behind. Helping start Longs Peak was one of the best decisions she has ever made as she loves leading the firm's internal initiatives, challenging the executive team to meet and exceed goals, and helping develop our team of GIPS standards superstars.

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.

Damian Handzy heads Confluence's Analytics Division and is responsible for the strategy and execution of its performance, risk, factor and market insights business. He brings 26 years of FinTech executive management experience, having held executive, commercial, product and research roles while serving asset managers, asset owners and asset service providers globally. He founded Investor Analytics in 1999 as the industry's first cloud-based, multi asset-class risk software firm, which he sold in 2016.

Dax Johnson, CFA, CIPM is a senior vice president responsible for asset owner product strategy, and a global product executive for risk analytics and performance at State Street. His team works with clients and prospects to understand their product needs and ensure our product development efforts align with current and future client demand. Dax is responsible for strategy and execution on product roadmaps to deliver compelling solutions to State Street clients. State Street provides investment analytics services to over 700 asset managers and allocators with assets over $13 trillion. Dax joined State Street in 2000. Over the following seven years, he was responsible for daily operations and the management of a fund accounting team. As a vice president, Dax was part of the senior team responsible for overseeing strategic west coast relationships. In 2007, Dax joined Performance and Analytics as a consultant, responsible for client service and moved into a product role in 2015. Dax is a member of the San Francisco CFA Society. He has volunteered with the CFA Institute on shaping the CIPM program and GASB on implementing performance return related requirements. Dax earned a B.S. in Finance and Business Administration with a minor in Economics from Saint Mary's College of California and a M.S. in Financial Analysis from University of San Francisco.

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.

Frances Barney Knutsen, CFA is a recently retired Managing Director from BNY, where for decades she was responsible for the delivery of performance measurement and risk analytics services to institutional clients. She continues to be involved in the performance measurement industry as an active volunteer with the CFA Institute Exam programs, and with the Women in Performance Measurement networking group. She is working with some non-profit firms to support their investment reporting processes. She is also a partner with BWK Communication Consultants, providing training programs in effective communication strategies. Frances holds a BA from Yale University and an MBA from the Wharton School of the University of Pennsylvania.

John M. Longo, PhD, CFA 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 seven 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 seven awards for teaching and research excellence at Rutgers Business School and Columbia 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.

Jose Michaelraj is a Senior Manager at Meradia. He specializes in resolving performance, operations, and technology challenges for asset managers, owners, and custodians. With extensive experience in performance transformation projects, he builds scalable architectures and enhances processing efficiencies across asset class, including private markets and derivatives. Jose restructures complex performance validation processes, tweaks performance algorithms and evaluates attribution platforms. His perspective that combines math, data and workflow helps identify a mix of vendor products and tools to achieve optimal operating models. He attempts to maximize business value while reducing operational risk. Jose recently built a performance validation tool using Python. As a thought leader, Jose has written articles in the Journal of Performance Measurement and CAIA blogs. He has developed multi-disciplinary training plans and delivered sessions to Operations and Technology teams.

Luke Petrus is a Consultant with Ortec Finance based in the Canadian office. Ortec Finance is a global financial technology provider specializing in solutions for risk and return management, enabling funds to manage their investment decisions. Ortec Finance has been providing software services with over 35 years of experience in econometrics and technology, particularly in relation to performance measurement and attribution.

Brian Puerschner is a Senior Account Executive at First Rate, Inc., specializing in Performance Measurement and Client Reporting solutions. With 16 years at First Rate and 22 years in the WealthTech industry, Brian brings deep expertise and has been integral at building and deploying innovative technology solutions for First Rate and its clients. He holds a BA in Economics from Rutgers College.

Debi 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.*

Alex Schlesinger is the Director of Artificial Intelligence (AI) Product Management and Technical Communications at SS&C. In this role, Alex leads the company's AI product strategy for its wealth and investment technologies, collaborating with a global team to analyze use cases, assess resource needs, and integrate AI advancements into SS&C's product roadmaps. Alex also works closely with SS&C's AI stakeholders to establish infrastructure and governance frameworks that ensure secure, reliable AI-driven product features for users. Beyond AI, Alex heads the Eze Technical Communications team, which is responsible for product documentation, release notes, and training materials—resources that also contribute to training and fine-tuning the company's AI systems. Before this role, Alex served as Director of Technical Communications from 2020–2024, and Associate Director of Technical Communications from 2018–2020. Prior to joining SS&C, Alex managed training, technical communications, and hardware/software deployments, working alongside clients such as the United States Air Force, Department of Veterans Affairs, and Walter Reed National Military Medical Center. Alex holds an MBA in Strategy and Leadership from Indiana University's Kelley School of Business and a BA in Communications from Old Dominion University.

Alex Shafran, CFA is Senior Vice President, Head of Performance Analytics and Client Reporting at Cohen & Steers. He has more than 25 years of industry experience. Before joining the firm in 2017, Mr. Shafran was with Alliance Bernstein, where he oversaw the global team responsible for the 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, 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 and risk industry conferences. He holds an MA from New York University and is based in New York.

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.

Ian Thompson, Ph.D. is Head of Performance Product Management in BNY's Data & Analytics business. Prior to joining BNY in May 2022, Ian had previously founded "Performance and Analytics Consultants Ltd" as a specialist portfolio analytics consultancy, providing advice and insights to asset managers, consultants and vendors. Ian has led product management in several performance vendor firms over the last 28 years (including StatPro, Bi-Sam and Strategic Asset Management Solutions). He has been a regular speaker at industry conferences and events, and has authored or co-authored six previous papers for *The Journal of Performance Measurement*. He holds a BSc and Ph.D. from London Universities.

Shankar Venkatraman, CFA, FRM heads the investment, performance and client reporting teams at American Century. Shankar joined American Century in 2020. Previously, he was with BNY where he led the development of data and digital capabilities for the asset servicing division. Prior to that, Shankar was at Citi where he was the global head of performance and risk analytics for its custody and fund services/investor services business. At Citi he had other roles where he managed technology, business intelligence solutions, and business process reengineering. Shankar is very active within the financial services industry and is a regular speaker at performance and risk forums. Shankar has an MBA from Stern business school, New York University.

Jose Zayas is an Enterprise Sales Engineer at Rimes, where he drives technical pre-sales activities for the company's enterprise data management solutions and investment management platform. Focused on large-scale enterprise opportunities across North America, he collaborates with clients to understand their strategic workflows and designs tailored solutions that optimize processes and meet specific data integration requirements. His role emphasizes delivering compelling product demonstrations, managing proof-of-concept projects, and ensuring seamless transitions to the Professional Services and Client Managed Services teams. Prior to his current role, Jose served as a Senior Sales Engineer, where he played a dual role in both pre-sales and post-sales capacities. He partnered with the Sales and Account Management teams to identify new opportunities and acted as a subject matter expert for financial data solutions during technical qualifications. Additionally, he managed post-sales implementations, ensuring seamless collaboration between implementation teams and clients to deliver high-quality results. His ability to bridge pre-sales technical expertise with post-sales execution contributed to successful client outcomes and strengthened Rimes' reputation in the market. With over two decades of experience in financial technology and data integration, Jose is committed to fostering innovation, empowering teams, and delivering exceptional value to clients. His leadership continues to enhance Rimes' ability to meet evolving industry demands and drive business growth globally.