PMAR XXIV Conference
Speaker Biographies

Jane Atmodjojo, CFA, CIPM
co-founded EquiForce in 2026 to modernize and streamline investment operations, performance measurement, and enterprise reporting for small and mid-sized asset managers. EquiForce combines purpose built, cost efficient modern technology with deep industry expertise to help firms elevate data quality, strengthen controls, and deliver more insightful reporting. Before launching EquiForce, Jane spent nearly 3 decades in leadership roles across investment operations, performance measurement and attribution, GIPS compliance, enterprise reporting, and data architecture. She has a proven track record of transforming back and middle office functions, modernizing reporting infrastructures, and implementing scalable, high impact data and reporting solutions. Her career includes key roles at Oaktree Capital Management, Capital Group, Kayne Anderson Rudnick Investment Management, ACR Alpine Capital Research, and fintech innovator Wilshire Analytics. She holds a B.S. from the University of Southern California (cum laude).

Jennifer Barnette, CFA, CIPM
has deep knowledge and substantial experience in all aspects of investment performance measurement and reporting, with particular expertise in the Global Investment Performance Standards (GIPS®). As a member of TSG's verification practice, she conducts GIPS and non-GIPS reviews, helping asset managers and asset owners have confidence in their reported returns. Jennifer partners with her clients to tackle various challenges they face, including creating meaningful composites, designing policies and procedures, and identifying solutions across a wide range of front, middle and back-office scenarios. Prior to joining TSG, Jennifer was immersed in performance measurement, portfolio analytics, and client reporting at a high-net-worth investment advisor, and an affiliated institutional asset manager where she was a member of the management committee. She led the teams responsible for measuring, managing, and reporting performance and analytics across diverse asset classes, and for GIPS compliance. She also has extensive experience in investment operations, including managing the administration of investment systems at several firms. She started her career as an equity research analyst, where she published numerous reports for Wall Street investment banks. She has been asked to speak on topics related to performance, client reporting, and investment operations at various industry conferences, and is an active volunteer for CFA Institute supporting the CIPM Program. She is a graduate of Old Dominion University, and has earned the CIPM designation from CFA Institute, and has held FINRA Series 7 and 63 licenses.

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 13 years of experience working specifically with the GIPS standards as a verifier and consultant. Having worked for verification firms for 6 years prior to joining Longs Peak, he has the experience necessary to help organizations of all shapes and sizes implement the GIPS standards and meaningful performance reporting. Matt is a seasoned GIPS and performance consultant and is exceptional at client service and leading teams. His ability to coach Longs Peaks' team and lead clients through GIPS and performance engagements is unparalleled.

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.

Michael A. Ervolini
is a seasoned finance professional who now spends his time as a writer and thought leader on the topics of active fund management, behavioral finance, and decision making. Mike founded and was CEO of two fintech companies supporting institutional investors: Cabot Investment Technology, Inc, Charter Research LLC). Early in his career he held various positions with asset managers AEW Capital Management, L.P. and a division of Franklin Templeton, formerly Legg Mason). Mike graduated from the University of Pennsylvania (MS) and Rutgers University (B.S.).

Claude Giguère
For more than three decades, Claude has helped define how the investment world measures and understands performance. As co-founder and president of Robust Technologies, he combines deep financial expertise with technical precision, building advanced analytics that power some of the industry's most sophisticated institutions. Claude's leadership extends beyond Robust. He sits on the Advisory Board of *The Journal of Performance Measurement*, has collaborated with the CFA Institute on the CIPM curriculum, and co-authored the Level II Reading on Fixed Income Attribution. Earlier in his career, he served as Product Manager for SYLVAN at Financial Models Company (now SS&C), where he pioneered one of the first commercial performance measurement systems in the industry. Today, Claude continues to push the boundaries of performance measurement, ensuring that innovation, transparency, and analytical depth remain at the core of Robust's mission.

Satheesh Jagannathan CFA, CIPM
is the product owner of Performance Analysis and Attribution in BNY's Data & Analytics business. He has been in the Performance attribution function for the last nine years. He owns the product development in the Eagle performance attribution sleeve and the API on the modernized tech stack. He is a published author in *The Journal of Performance Measurement* contributing on topics like attribution and IRR contribution analysis. Satheesh earned his mechanical engineering degree from the College of Engineering, Guindy, India.

Rob Langrick, CFA, CIPM
is Chief Product Advocate for CFA Institute based out of the New York office. He was previously GM of the CFA Program and before that Head of Practice Analysis, overseeing annual curriculum updates to the CFA Program. Before joining CFA Institute, he led Bloomberg's finance education division where he built and launched Bloomberg's certification product, which has now garnered over 1M designation holders. He began his career as a sell-side equity research analyst in London and after earning his MBA from Dartmouth worked in the private equity diligence unit of Bain & Company in New York.

Jon Loboda
is a Performance Measurement Operations Manager at the State of Wisconsin Investment Board, where he is responsible for all aspects of the performance calculation process, managing performance data, and producing internal and external performance reporting and analysis. In his role, he is responsible for a team of 5 analysts that support the Wisconsin Retirement System Core Trust and Variable Trust Funds, State Investment Fund, and other separately managed state-sponsored investment funds. Prior to joining SWIB, Jon worked at Neuberger Berman where he led a team of Performance Analysts specializing in Fixed Income performance, composite maintenance, GIPS Compliance, new account onboarding and IBOR/ABOR performance system transitions. Jon started his career at Northern Trust as a Portfolio Accounting Analyst before moving to a client facing Performance Analyst Role. Jon holds a BA degree in Economics from the University of Illinois.

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.

Arun Muralidhar, Ph.D.
is Founder of Mcube Investment Technologies LLC and Founder and Client CIO of AlphaEngine Global Investment Solutions. He serves on the Advisory Board of *The Journal of Performance Measurement* and has won the Dietz Award twice, and Honorable Mention as well, for his articles on skill-adjusted risk-adjusted performance, performance attribution to ensure accountability and representing risk-adjusted performance measures using vector geometry. He has written books and papers with Nobel Laureates Profs. Franco Modigliani and Robert C. Merton on pension reform, and has written extensively on asset allocation, asset pricing, currency overlay and financial innovation. He is also adjunct professor of Finance at Georgetown University, McDonough School of Business. He holds a Ph.D. in Managerial Economics from the MIT Sloan School of Management, and a B.S. from Wabash College.

Jessica Murphy
is the Director of Performance Reporting at PRIM, where she is responsible for the accurate and timely delivery of investment performance reports. In her role, she collaborates closely with the Custodian's performance team to continually enhance reporting processes, oversees the firm's annual GIPS verification, and leads efforts to refine internal workflows. Currently, she is spearheading the implementation of a new reporting platform, further strengthening PRIM's performance reporting capabilities. Mrs. Murphy has over 18 years of experience in performance analysis and reporting, with deep expertise gained during her tenure at BNY. As a Lead Manager within the bank's Performance and Risk Analytics Group, she oversaw performance analysis and reporting for a range of clients, including large public pension funds, endowments, and corporate institutions. She holds a Bachelor of Science degree in Economics and Finance from Bentley College.

Josh O'Brien, CFA
leads Strategic's efforts at the cross section of client service, technology, and operations. He is responsible for designing and implementing optimal workflows and processes around the client experience, which includes broad support of Client Portfolio Management and the overall investment team. He serves as co-chair of Strategic's Management Committee and serves on Strategic's Operating Committee. 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. Josh 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. He is a member of the CFA Society of Washington, D.C.

Prasanth Pahi, CPA, CFA
is the head of the performance reporting & attribution function as part of the Performance & Controllership team in Finance supporting the Capital Markets business at OMERS. The team acts as the Finance Business partner for the Credit, Equities, Multi-Asset, and Total Portfolio Management business units, and is responsible for measuring investment performance and assessing drivers against benchmarks, providing senior management with additional insights and analytics. Prasanth currently leads, directly and indirectly a team of 12 people and prioritizes team engagement, career development and coaching with junior colleagues. Prasanth graduated from the University of Waterloo with a Bachelor of Accounting & Financial Management.

Ashley Reeves, CIPM
is a Senior Vice President and Senior GIPS verifier. Ashley regularly conducts GIPS and non-GIPS verifications, as well as GIPS examinations. She has more than 25 years of industry experience, with 21 directly involved in GIPS standards verifications. Before joining TSG, Ashley was 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 served on the GIPS Standards Interpretations Subcommittee. Ashley received her B.A. in Business Economics from the University of California, Santa Barbara.

Paul Rodriguez
is a Senior Technical Sales Specialist at Confluence Technologies, where he covers global and North American accounts across the firm's full suite of performance attribution, risk, and analytics solutions. With 18 years of experience at the intersection of quantitative finance and financial technology, Paul has worked across the buy-side ecosystem — from hedge funds and asset managers to pension funds and large asset owners — helping institutions evaluate, implement, and extract value from complex analytics platforms.

Alex Serman, CIPM
Managing Director of Wealth and Institutional at First Rate, is a thought leader in the wealth technology space with a focus on performance measurement, client reporting, and artificial intelligence solutions. With a decade in the industry, he manages relationships with clients servicing a diverse set of needs for private banks, trust firms, institutional asset managers, and more. His team of expert analysts provide support for these clients and guidance for their performance and reporting roadmaps. As the host of the Whiskey&WealthTech podcast, Alex shares insights from industry experts and leading figures developing the next generation of technology for investment management. He is also the recipient of the 2024 Financial Technologies Forum Ops Businessperson of the Year Award for his work in driving the industry forward through collaboration with back-office, front-office, and development teams. Alex continues to push the boundaries of what's capable in wealthtech and providing the industry with the knowledge and tools to better serve their clients.

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.

Douglas Spaulding
is a Senior Vice President at TSG, Editor of *The Journal of Performance Measurement*, and co-host of *TSG Time with Pat & Doug*. He has been with the company since 2003. He received his BA from Centenary College and his MFA in Creative Writing from Fairleigh Dickinson University.

Patrick Trencansky, CIPM
is a Senior Performance Analyst at Diamond Hill, where he specializes in performance measurement, attribution, and ensuring compliance with the Global Investment Performance Standards (GIPS). Patrick is also an active member of the CFA Society Jacksonville. Prior to joining Diamond Hill, Patrick served as a Performance Analyst at Bank of America Private Bank, leading a team of analysts responsible for evaluating performance for high-net-worth clients. Patrick holds a Bachelor of Science degree in finance and accounting from Cabrini University and an MBA from the University of North Carolina at Charlotte. He has also earned the Financial Data Professional (FDP) designation, focusing on the intersection of finance with AI and advanced data analytics.