



AIMSE
CANADA



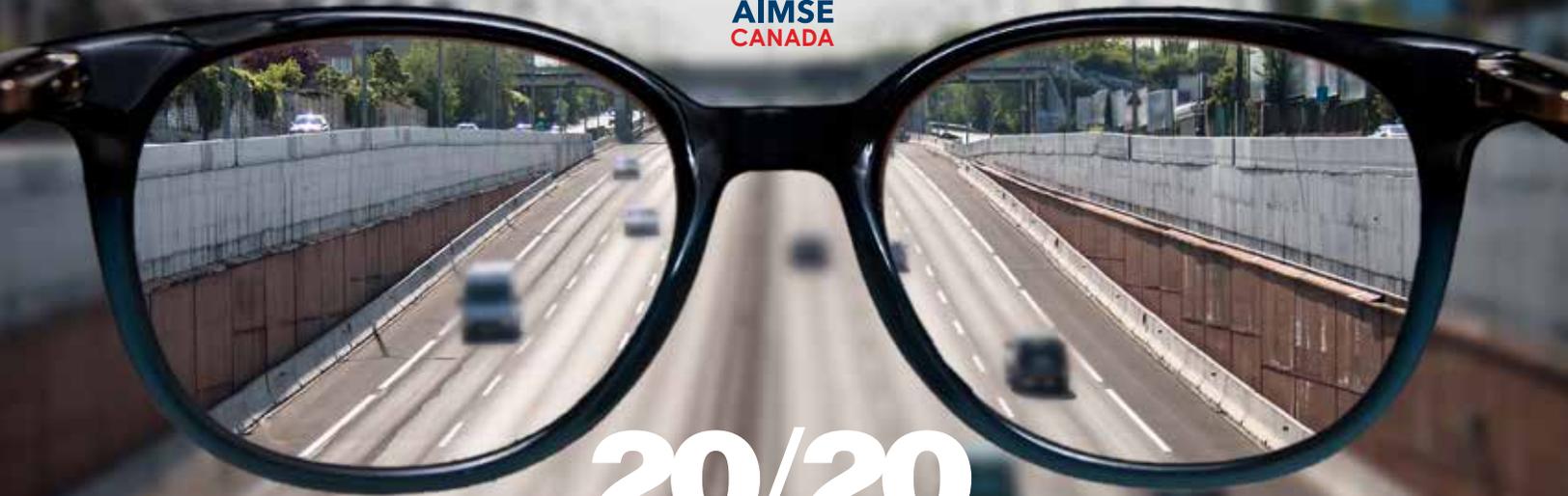
20/20
VISION
A VIEW TO THE
ROAD AHEAD

27th Annual Canadian Conference
JANUARY 15–16, 2020
Intercontinental Toronto Centre | Toronto, ON

PROGRAM



AIMSE
CANADA



20/20 VISION

A VIEW TO THE ROAD AHEAD

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**The Association of Investment Management
Sales Executives (AIMSE)**

WELCOMES YOU TO THE

27th Annual Canadian Conference

JANUARY 15–16, 2020

Intercontinental Toronto Centre | Toronto, ON



**AIMSE
CANADA**

For almost 3 decades, AIMSE has been providing investment management sales and service executives:

Access to Allocators and Consultants

Professional Development Tools Designed to Increase Your Success

Knowledge and Education

On Wednesday, January 15, we invite you to join us for an evening welcome reception at the Intercontinental Toronto where you can kick off the conference by networking with industry peers in a relaxed and informal setting.

On Thursday, January 16, our full-day conference begins. We will kick off the day with an insightful keynote address by **Fiona Rawle, PhD**, who will specifically explore unconscious bias from the perspective of a finance professional, as well as the perspective of the client. Other conference sessions include a discussion about solvency issues that pension plans are facing, an off-the-record discussion with key consultants, and the ever-popular allocator roundtables. Also, do not miss the opportunity to hear from **Rachel Volynsky**, Mercer Canada's new CIO, who will discuss her new role and her views on asset allocation and portfolio construction.

Sincerely,

Kimberley Woolverton, CFA

President, AIMSE Canada & Conference Chair

Executive Vice President, Head of Distribution, Foyston, Gordon & Payne Inc.

27th Annual Canadian Conference



AGENDA

WEDNESDAY JANUARY 15, 2020

5:30 pm – 8:30 pm Opening Cocktail Reception
Ontario/Niagara Room

THURSDAY JANUARY 16, 2020

7:30 am – 8:00 am Networking Breakfast with Exhibitors
Ballroom A

Sponsored by:



8:00 am – 8:10 am **Welcome & Introduction**
Ballroom B

Kimberley Woolverton, CFA

President | AIMSE Canada & Conference Chair

Executive Vice President, Head of Distribution, Foyston, Gordon & Payne Inc.

8:10 am – 8:30 am **Now a Word from Our Sponsors**
Ballroom B

8:30 am – 9:30 am **Keynote Address by Fiona Rawle, PhD**
Ballroom B

Unconscious Bias in Finance: Evidence, Challenges and Strategies

This session will introduce the phenomenon of unconscious bias and explore how to recognize and overcome this bias. Going beyond anecdote, we will examine data and evidence for bias and investigate proven strategies for overcoming bias. To do so, we will draw on examples from diverse fields, including finance, medicine, science, academia, and music. For finance, we will specifically explore unconscious bias from the perspective of a finance professional, as well as the perspective of the client.

**Speakers listed are confirmed to date and subject to change.*



AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

9:40 am – 10:15 am **Low Interest Rates, Increasing Life Expectancy, Changes to Solvency/ Regulations—What does it mean for Pension Plans and Insurers?**
Ballroom B

This session will look at the economic, demographic and regulatory impact on pension plans and by extension insurance companies. Will recent changes to solvency funding requirements stem the tide of pension plan closures? Or will the trend of private sector plans shifting the risk to insurers continue? How could these trends impact on investment choices by pension plans and insurers.

Moderator: **Eric Bonnor**
 Senior Vice President | Private Funds, Canada, Brookfield Asset Management

Speaker: **Paul Forestell, FSA, FCIA**
 President and Chief Executive Officer | Brookfield Annuity Company

10:15 am – 10:45 am Refreshment Break
Ballroom A with Sponsors & Exhibitors

Sponsored by: BENEFITS AND PENSIONS
MONITOR

10:45 am – 11:30 am **Meet Mercer Canada CIO, Rachel Volynsky**
Ballroom B

Rachel Volynsky, Mercer Canada's recently appointed CIO responsible for their outsourced chief investment officer team in Canada, will speak about her new role and responsibilities, including her views on asset allocation and portfolio construction.

Moderator: **Kimberley Woolverton, CFA**
 President | AIMSE Canada & Conference Chair
 Executive Vice President, Head of Distribution, Foyston, Gordon & Payne Inc.

Speaker: **Rachel Volynsky**
 Chief Investment Officer | Delegated Solutions, Mercer

**Speakers listed are confirmed to date and subject to change.*



AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

11:40 am – 12:00 pm **eVestment’s Institutional Trends Insights**

Ballroom B

eVestment’s Global Head of Insights, John Molesphini, will share how institutional assets are moving across the world, what asset classes are receiving the most interest from institutional investors and consultants, and will finish by touching on Canadian market trends.

Moderator: **Brad Haughey, CFA**

Director of Global Equities | Black Creek Investment Management Inc.

Speaker: **John Molesphini**

Global Head of Insight | eVestment

12:00 pm – 1:00 pm **Networking Lunch with Exhibitors**

Ontario/Niagara Room



Callan LLC

Callan’s Institutional Consulting Group (ICG) empowers investment management organizations with the research, education and analytical services necessary to succeed in an evolving and extremely competitive environment. Callan assists investment management organizations in three areas:

1. Market Trend Analysis
2. Portfolio Analytics
3. Institutional Investment Education

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**Speakers listed are confirmed to date and subject to change.*



AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

1:00 pm – 2:30 pm **Allocator Roundtables**
Ballroom B

Don't miss this opportunity to meet top capital allocators in Canada in an intimate roundtable setting. Ask them the questions you have always wanted answered and learn more about how to interact with them to meet their needs. Each allocator will be joining you at your table for an open discussion about their roles, their organization, and what they are doing. You will learn what it takes to get your firm positioned for future success, and best of all, no hassles from hustling from one meeting to the next, whether by planes, trains or automobiles.

Moderator: **Joyce Hum, CFA**
Director | Consultant Relations, BMO Global Asset Management

Speakers: **Arijit Banik**
Interim Treasurer | York University Endowment Fund

Ryan Bradley, MBA
Investment Officer | Province of Prince Edward Island

Michael Dodd, CPA, CGA, CFP
Director, Pensions Treasury and Shareholder Services | The Co-Operators Group Limited

Darin Eddy, CFA
Director | Public Markets, HRM Pension Plan

David Kaposi
Chief Investment Officer | Ontario Power Generation Inc.

Jeff Norton, LLM, CFA
President & CEO, Chief Investment Officer | Teacher's Retirement Allowance Fund

Blair Richards, BA, MBA
CEO | Halifax Port ILA/HEA

Jill Taylor Smith, CFA
Senior Manager, Pension Investment Management | TD Bank Group

Tom Valks, CFA, CPA, CMA
Chief Investment Officer, Directeur Principal, Pension Fund and Investment Management
University of Ottawa

2:30 pm – 3:00 pm Refreshment Break
Ballroom A with Sponsors & Exhibitors

Sponsored by: 

**Speakers listed are confirmed to date and subject to change.*



AGENDA

THURSDAY JANUARY 16, 2020 *(continued)*

3:00 pm – 4:00 pm **Consultant's Panel-Off the Record**
Ballroom B

Come and meet key consultants and ask those questions you've been wanting to ask to help you succeed with these influential firms. Always a popular conference session, you will have access to top consultants who will identify key themes, discuss search activity, client priorities and how best to work with their research and field consultants. Come prepared with all of your pressing questions!

Moderator: **Sherry Lee Gregory, MBA**
Vice President | Consultant Relations, Franklin Templeton Investments

Speakers: **Jason Campbell**
Principal | Investment Consulting, Eckler
Brian Cyr, CFA
Managing Director | bfinance
Jillian Kennedy
Partner, Wealth | Mercer
Jill Purcell
Associate Partner, Investment Consulting | Aon Investment Consulting

4:00 pm **Closing Remarks**
Ballroom B

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**Speakers listed are confirmed to date and subject to change.*



BIOGRAPHIES

KEYNOTE SPEAKER



Fiona Rawle, PhD

Associate Dean, Undergraduate, and Associate Professor, Teaching Stream, Department of Biology
University of Toronto Mississauga

Fiona Rawle has a Ph.D in Pathology and Molecular Medicine and is the Associate Dean, Undergraduate, at the University of Toronto Mississauga, and an Associate Professor, Teaching Stream, in the Dept. of Biology. Her research focuses on public communication of science, science education, and the science of learning. She has received numerous awards focused on teaching, including the University of Toronto's President's Teaching Award. Dr. Rawle is also a member of the University of Toronto's TIDE group (Toronto Initiative for Diversity & Excellence), through which she gives lectures and workshops on unconscious bias, equity, and diversity.

SPEAKERS



Arijit Banik

Interim Treasurer
York University Endowment Fund

Arijit Banik is the treasurer for York University, responsible for the university's endowment and balance sheet. Prior to his role at York, Arijit has extensive experience in treasury, pension, and product management functions within Canada's largest bank and custodian. During that time, Arijit worked in asset liability management, pension investments, forecasting and treasury desk roles, as well as securities lending product functions.

Arijit graduated from the University of Waterloo with bachelor's degrees in Chemical Engineering and Economics. He has an MBA from the Schulich School of Business (York University) and holds the Chartered Alternative Investment Analyst (CAIA) and Chartered Investment Manager (CIM) designations.



Ryan Bradley, MBA

Investment Officer
Government of Prince Edward Island

Ryan Bradley is the Investment Officer at the province of Prince Edward Island. Mr. Bradley has been with the department of Finance for 10 years and is responsible for the oversight and strategic direction of the \$3.2 billion dollar pension assets of the Government of Prince Edward Island Master Trust.

Along with overseeing the pension assets, Mr. Bradley also looks after the \$2 billion-dollar provincial long-term debt program and sinking fund investments.

Prior to working with the Province of PEI, Mr. Bradley worked in the Private sector in the IT industry specializing in Data Warehousing and Data mining.



Jason Campbell, CFA, CAIA

Principal
Eckler

A Principal within Eckler's Investment Consulting practice, Jason joined the firm in 2006. He provides investment strategy advice to a wide range of institutional clients, including DB and DC pension plans, endowment/foundations, corporations and non-profit organizations.

In addition to consulting responsibilities, Jason is a member of the Investment Research Steering Committee which oversees investment manager and strategy research.

Jason's specific area of expertise is alternative investments including infrastructure, real estate, private equity/debt strategies and hedge funds.

An active volunteer within the pension and investment community, Jason has authored several articles and presented on investment strategy at numerous conferences. He is currently a member of the Canadian Investment Review Advisory Board, a volunteer on the CNIB's National Investment & Pension Committee and a director with the National Ballet School Foundation.

Jason graduated from the University of Western Ontario in 1999 with an Economics degree. He has also earned the designations of Chartered Financial Analyst and Chartered Alternative Investment Analyst.



BIOGRAPHIES



Brian Cyr, CFA

Managing Director
Bfinance

Brian oversees the business development and relationship management of bfinance in Canada. Prior to joining bfinance in 2012,

Brian was responsible for the servicing of institutional clients in Eastern Canada for Fidelity Investments. Previously, Brian was Manager, Investment Program, in Standard Life's Group Savings & Retirement division. His responsibilities included the selection and monitoring of asset managers as well as investment counseling to DC and DB pension schemes across Canada. Brian began his career in 1998 at Caisse de dépôt et placement du Québec (CDPQ) where he held various analyst roles, notably in Private Placements. Brian earned a BA in Public Communications and a BBA in International Business from Université Laval in Quebec City. Brian is a CFA Charterholder.



Michael Dodd, CPA, CGA, CFP

Director, Pensions Treasury
and Shareholder Services
The Co-Operators Group Limited

Michael Dodd joined the Co-operators Group in 2003. He is currently Director of Pensions,

Treasury, and Shareholder Services at the Co-operators Group. In his role, he oversees the management of the Co-operators Group Defined Contribution Pension Plan with Assets under management of over 1 billion dollars. Michael also sits on the Pension Committee of a Defined Benefit plan for Co-Operators subsidiary The Cumis Group.

Dodd is also a long-standing member of the Association of Canadian Pension Management (ACPM) Ontario Regional Council. He has also participated in many Industry Conferences including as a speaker or panelist from time to time.

Dodd holds a CPA CGA degree as well as a CFP designation.



Darin Eddy, CFA

Director, Public Markets
HRM Pension Plan

Darin Eddy, CFA is Director of Public Markets at the Halifax Regional Municipality Pension Plan. In his role he is responsible for oversight and research in public fixed income, public equities, liquid alternatives and currency. He is further involved in asset allocation, portfolio construction and risk management.



David Kaposi

Chief Investment Officer
Ontario Power Generation Inc.

David Kaposi joined Ontario Power Generation Inc. (OPG) in 2013 as Chief Investment Officer and leads a team that is responsible for managing OPG's investment portfolio of public and private assets. OPG's Pension Fund has \$15 billion in assets and serves over 22,000 members, making it one of the largest single-employer plans in Canada. Additionally, OPG manages a combined \$23 billion in the Nuclear Used Fuel Fund and the Nuclear Decommissioning Fund.

David has been working in the institutional investment industry since 1998 and prior to joining OPG he was a Partner and Global Head of Alternatives at Mercer, where he was a member of the firm's global Alternative Investment Committee. He was also a Partner with Bastion Infrastructure Group, and Director of Manager Research at Hewitt Associates (now AON) in Canada.

David is a graduate Victoria College in the University of Toronto. He is also a holder of the Institute of Corporate Directors Director designation and is a CFA Charterholder.



BIOGRAPHIES



Jillian Kennedy

Partner, Wealth
Mercer

Jillian Kennedy is a Partner in Mercer's Wealth Business and is responsible for leading the Defined Contribution and Financial Wellness

Strategy for Canada. She is also a member of the Wealth leadership team and works closely with Mercer's global teams. Jillian's main practice area is in supporting defined contribution pension plan and savings plans for plan sponsors and plan members. From plan design, investments, service provider management and ongoing governance support, Jillian applies a holistic approach to proactively manage plan sponsor objectives and improve the overall financial wellness of employees.

Jillian has been with Mercer for over 13 years and has been supporting plan sponsors and members to achieve better outcomes in retirement savings for over 19 years.



Paul Forestell, FSA, FCIA

President and Chief Executive Officer
Brookfield Annuity Company

As President and Chief Executive Officer, Paul oversees the overall business operations and strategic development of Brookfield Annuity.

Prior to heading the company's launch, he worked for one of the world's leading retirement and pension consultancies, most recently as the head of its Canadian Retirement practice.

Over the course of more than 25 years of working with pension plans and plan sponsors, Paul has gained exceptional insight into the challenges facing the Canadian pension sector.



John Molesphini

Global Head of Insights
eVestment

John is currently eVestment's Global Head of Strategic Engagement, where he focuses on enhancing the relationship with leadership

at client firms and also discussing industry trends and eVestment's data and analysis with broader client and industry audiences. Previously, he was Global Head of Client Success, managing efforts to ensure eVestment's clients realize their full value and satisfaction with their subscriptions while having an amazing client experience. Prior to that, he has served as the Director of eVestment's Global Sales Specialist team, an Omni Specialist on the eVestment Business Development team, and Vice President and Manager of Client Service. Prior to joining eVestment in July 2006, John worked for a hedge fund for a short time and before that, he spent four years at INVESCO, most notably as a Marketing Support Manager which included the consultant database reporting team. John began his career as a financial advisor with Quick & Reilly (now part of Bank of America Merrill Lynch).



Jeff Norton, BSc, LLM, CFA

President & CEO, Chief Investment Officer
Teacher's Retirement Allowance Fund

Jeff is responsible for the overall operations of the Teachers' Retirement Allowances Fund (TRAF), including investment activity. Prior to

initially joining TRAF in 2005, Jeff was President of Assante Global Advisors Inc., an investment management firm based in Los Angeles, California.

Jeff holds two degrees from the University of Manitoba (Industrial Engineering, 1986, Gold Medalist; Law, 1989, Dean's Honour List), as well as a Master of Laws degree from the London School of Economics. Jeff is also a Chartered Financial Analyst (CFA) charterholder.

Jeff is actively involved in the community, and currently sits on the Board of the Jewish Foundation of Manitoba and is Chair of its Investment Committee. He is also Chair of the Treasury Risk Oversight Committee for the Province of Manitoba, a member of the Investment Committee for the Winnipeg Civic



BIOGRAPHIES

Employees' Benefit Program and serves on the Complaints Investigations Committee for the Chartered Professional Accountants of Manitoba. Within the pension industry, Jeff has served as a director of both the Association of Canadian Pension Management (ACPM) and the Pension Investment Association of Canada. Currently, Jeff serves on the Executive Committee of ACPM.



Jill Purcell

Associate Partner, Investment Consulting
Aon Investment Consulting

Jill is an Associate Partner within the Investment Consulting practice of Aon. She works with institutional investors across

Canada and her responsibilities include advising clients on matters related to governance and investment of institutional assets. Jill also plays a role in strategic client planning and business development within the practice.

Jill brings over 18 years of investment consulting experience where she establishes relationships and builds trust with client executives, their committees and boards to ensure their time is well spent on the issues that matter and add the most value to their members.

She is a subject matter expert for all aspects of institutional investing for defined benefit pension plans and defined contribution plans including: investment manager research, investment structure, performance measurement, governance, asset allocation strategy and implementation, liability driven investing, risk management, and de-risking. Jill also specializes in custodian and record keeper provider research.



Blair Richards, BA, MBA

CEO
Halifax Port ILA/HEA

Blair Richards is the Chief Executive Officer of the Halifax Port ILA/HEA. He is also a Director of the Workers' Compensation Board of Nova

Scotia and is a member of its Investment Committee.

Mr. Richards has served in senior leadership positions on numerous boards, councils, and committees. He holds a Bachelor of Arts from Dalhousie University and a Master of Business Administration from Saint Mary's University, in addition to multiple certifications.

Jill Taylor Smith, CFA

Senior Manager
Pension Investment Management
TD Bank Group

Jill joined TD's pension investment team in June 2018 as a Senior Manager. In this role, she is responsible for overseeing the investments of the retirement savings plans for TD's US employees.

Jill began her career almost 25 years ago as an investment analyst with a mutual fund company. Since then she has held a series of progressive roles, including product development at different financial institutions, heading up investment manager research at a leading consulting firm, and investment consulting. Prior to joining TD, Jill was a member of the DC consulting team with an actuarial and benefits consulting firm.

Jill specializes in evaluating investment strategies and investment managers for both defined benefit and defined contribution plans. As such, her work encompasses: manager searches, investment monitoring, investment strategy, investment policy statements and plan governance.

Jill holds a Master of Arts in Economics from Queens University and a Bachelor of Arts in Mathematics with Economics from the University of Western Ontario. She also has her Chartered Financial Analyst designation.



Tom Valks, CFA, CPA, CMA

Chief Investment Officer, Directeur Principal,
Pension Fund and Investment Management
University of Ottawa

Tom Valks is the Chief Investment Officer of the University of Ottawa Pension Fund and

Investment Management. Earlier in his career he was a senior investment manager and a member of the national leadership team with Canada Mortgage and Housing Corporation, as well as a partner, vice-president and portfolio manager with Montrusco Bolton Investments Inc. and its predecessor company Bolton Tremblay Inc. He is a CFA charter holder, and has a CPA CMA designation and is a graduate from the HEAO-school in The Netherlands.



BIOGRAPHIES



Rachel Volynsky

Chief Investment Officer
Delegated Solutions
Mercer

Rachel Volynsky joined Mercer Canada as Chief Investment Officer in September 2019,

focusing on leading the OCIO Investment Team in Canada. She is based in the Toronto office.

With over 20 years of capital allocation experience, Rachel brings significant expertise in the management of public markets investment and growing assets for industry-leading global asset managers. Prior to joining Mercer, Rachel held several

senior roles with major investment firms in Canada and the United States, as well as with one of the largest pension funds in North America. Her most recent role was Head of Canadian equities, SEI Canada, where she led the restructuring effort of the Canadian funds. Prior to that Rachel was a senior Global portfolio manager and head of research at a leading ESG managers in the US.

Additionally, Rachel obtained an International Master of Business Administration from York University and is a CFA charterholder. She is also fluent and conversant in five languages.

AIMSE CANADA BOARD MEMBERS



Kimberley Woolverton, CFA

President, AIMSE Canada & Conference Chair
Executive Vice President, Head of Distribution
Foyston, Gordon & Payne Inc.

Kimberley joined Foyston, Gordon & Payne (FGP) in 2018 to lead the institutional client servicing team. In 2019, she was promoted to Head of Distribution responsible for the firm's business development, marketing and client servicing. She is also a member of FGP's Investment Committee and FGP's Executive Committee.

Kimberley's investment career began in 1994. She held positions at The Guardian Group of Funds, Lincoln Trust Company, and Merrill Lynch before moving into institutional business development and client servicing roles at Burgundy Asset Management and Aberdeen Asset Management.

She is a graduate of McGill University (BSc) and is a CFA charterholder.

Kimberley has been actively involved with the Association of Investment Management Sales Executives (AIMSE) and currently serves as the President of AIMSE Canada and as a member of the U.S. Board of Directors.



Eric Bonnor

Senior Vice President, Private Funds
Brookfield Asset Management

Eric Bonnor is a Senior Vice President at Brookfield Asset Management and is the senior relationship manager for the Canadian market for Brookfield's Private Funds Group. Prior to his current role, he was responsible for capital raising, marketing and investor relations efforts with investment consultants for such asset classes globally. Mr. Bonnor has had a varied career in Brookfield in asset management and in senior roles: from 2013 to 2015 based in Brazil as the senior client relationship manager for Brookfield's Brazil-related fund-raising and investor relations and private capital fund structuring; from 2007 to 2013 as the senior client relationship manager for Canadian institutional investors; from 1998 to 2006 as Managing Director for the company's timber assets in Brazil, followed by the successful establishment of its \$280 million Brazil Timber Fund I. Eric is a graduate of the University of Toronto with an Honors BScF degree.



Sherry Lee Gregory

Vice President, Consultant Relations
and Institutional Sales
Guardian Capital



AIMSE CANADA BOARD MEMBERS



Brad Haughey, CFA

Director of Global Equities
Black Creek Investment Management, Inc.

Brad joined Black Creek Investment Management in October 2017 and brings 18 years of investment industry experience with him. At Black Creek he works with the business development and client relations team to help deliver in-depth communication to clients and investment consultants on our investment philosophy, process and investment strategies.

Prior to Black Creek, Brad was a Vice President, Marketing & Client Services with Sprucegrove Investment Management, where he had marketing and client service responsibilities for clients, consultants and prospects across the United States and Canada. Previously, he was a Vice President and Product Specialist, Canadian Equities, with Greystone Managed Investment and a Vice President with McLean Budden, working as a product specialist covering international equities. Brad also worked at SEI Investments in performance measurement and portfolio analytics.

In addition to his CFA® Charter, Brad holds a Bachelor of Arts in Economics from Queen's University, and an Honours Bachelor of Commerce from the University of Windsor.



Joyce Hum, CFA, MBA

Director, Consultant Relations
BMO Global Asset Management

Joyce is responsible for developing and managing relationships with Canadian institutional investment consultants in collaboration with BMO GAM consultant relations directors globally. In addition, she educates manager research and field consultants on BMO GAM investment strategies.

Joyce comes to the organization with 24 years of experience having worked in similar roles with both Guardian Capital LP and State Street Global Advisors. Previous to that she held a consultant role with Towers Perrin, Asset Consulting Group. In the industry, she is known for building long-term relationships with clients and providing exceptional service. Joyce received her MBA from the Schulich School of Business and became a CFA charter holder in 1999.



Karynna L. Ma

Vice President, Business Development-
Institutional Sales
Timbercreek

Karynna Ma joined Timbercreek in the Spring of 2017 as Vice President, Institutional Sales.

She is responsible for business development and relationship management within the institutional channel in North America.

Ms. Ma has over 15 years of experience providing financial products and services to both retail and institutional investors in public and private markets. Prior to joining Timbercreek, she was Vice President, Investor Relations at Bastion Infrastructure Group, Director, Managed Assets at Mackenzie Investments and worked at Fidelity Investments where she held a number of positions in the product, sales and marketing areas. Ms. Ma holds a Bachelor of Arts in Political Science from the University of Toronto.



Angela Vidakovich, CIM

Director, Client Relationship Management
Brookfield Asset Management

Angela Vidakovich has 32 years of industry experience and is a Director, Client Relationship Management for the Brookfield

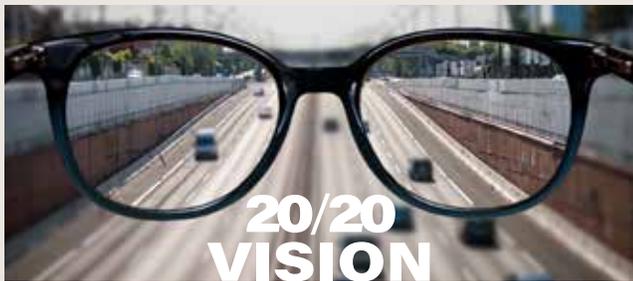
Public Securities Group for the last 10 years. She is based in Toronto and is currently responsible for Wealth Management, Insurance and Banking Channels and spent her first 8 years at Brookfield focused on Institutional Channels in Canada.

Prior to joining the firm in 2009, she held several roles covering investment management, back-office investment services, and commercial real estate for the institutional market in Canada. Angela worked in institutional sales for RBC Securities Services (formerly known as Royal Trust), State Street, and UBS Global Asset Management. Angela also has experience in marketing, sales and product development for both public and private real asset strategies and funds. She started her career in Office Leasing with CBRE (formerly known as Coldwell Banker). Angela holds the Canadian Investment Manager designation (CIM) and earned a Bachelor of Arts degree from the University of Toronto.



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Callan was founded as an employee-owned investment consulting firm in 1973. Since then, we have empowered institutional investors with creative, tailored strategies that are backed by proprietary research, an industry-leading database and ongoing education. We use a client-focused consulting model to serve public and private pension plan sponsors, endowments, foundations, operating funds, smaller investment consulting firms, investment managers, and financial intermediaries.

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Since our founding in 1998, Imagineer has focused on providing relationship management software and services that help investor relations, and fund marketing teams at asset management firms to effectively manage their clients and operate their businesses efficiently and intelligently.

This dedication to our craft, coupled with the in-depth industry knowledge and long-term continuity of our team, results in an unparalleled level of competency, enabling us to create best-in-class applications and provide unmatched service to our clients.

S&P Dow Jones Indices

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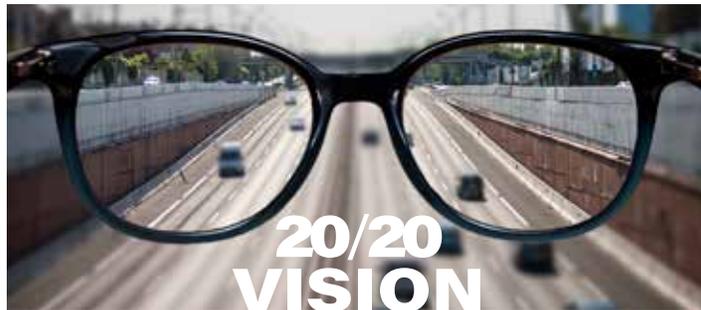
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