

Pension Plan Governors, Biographies

Pension Board

Mitchell Anderson, BA(Hons), MBA, MDiv(Hons)

Mitchell Anderson serves as a representative of the General Council Executive to the Pension Board. Mitchell is lead minister at St. Paul's United Church in Saskatoon, which has grown 60% during his time as lead minister, by reaching younger and diverse communities. In addition to his work in the church, Mitchell holds an MBA, serves on boards in the credit union system and acts as an advisor to a social impact investment fund. Mitchell is passionate about building up a church with purpose that equips disciples of Jesus Christ to serve the mission of God.

Sharon Aylsworth Hons BA (Math)

Sharon Aylsworth serves as a Pension Board member-at-large, from March 2023. Prior to that, Sharon served as a representative of the General Council Executive to the Pension Board. In her working career, Sharon had years of computer systems development management experience with BELL Canada and CGI. Within the church, she has recently served on the executive of both Presbytery and Conference and as Chair of her local church council. She has used a wheelchair for over 15 years and brings a particular interest in disability and accessibility issues. With her husband, she lives in the Beach area of Toronto and attends Jubilee United Church.

Darwin Bozek FCPA, FCGA, ICD.D

Darwin is currently the President & CEO of Ontario Pension Board (OPB), which is the administrator of the Public Service Pension Plan, a major defined benefit pension plan, sponsored by the Government of Ontario. OPB's membership is comprised of certain employees of the provincial government and its agencies, boards, and commissions. Previously, Darwin was the President and CEO of Alberta Pensions Services Corporation (APS), which provides pension services to more than 385,000 public sector employees and pensioners throughout the Province of Alberta. Darwin is committed to ensuring OPB is well-positioned to deliver on the pension promise now and into the future by building on the existing foundation of professional and dedicated employees and growing workforce capacity. Darwin has extensive leadership experience, with close to 30 plus years working in the public service. Prior to joining APS, Darwin was the Senior Assistant Deputy Minister of Alberta Treasury Board and Finance. Previous roles include Controller for the Province of Alberta; Chief Financial Officer for AIMCo and the City of St. Albert; Assistant Deputy Minister, Strategic and Business Services, Alberta Finance; and auditor for the Office of the Auditor General. Darwin started his accounting career as an articling student with Ernst and Young Chartered Accountants after playing professional hockey in the Los Angeles Kings organization. Darwin has a Bachelor of Commerce degree from the University of Alberta, and is a Fellow of the Chartered Professional Accountants.

Tamara DeMos, FSA, FCIA

Tamara retired in June 2022 from her role as the Managing Director of the Private Pension Plans Division at the Office of the Superintendent of Financial Institutions (OSFI). In that role, she was responsible for all aspects of the supervision of private pension plans subject to Canadian federal legislation. Tamara joined OSFI in 2011. Prior to joining OSFI, Tamara was with the Treasury Board Secretariat where she held various roles related to the Canadian federal public service pension plan. Prior to 2007, she worked 18 years as a retirement consultant with Mercer. Tamara holds a Bachelor of Mathematics from the University of Waterloo. Currently Tamara is working on a part-time basis on various pension projects for the Financial Services Regulatory Authority of Ontario. She lives in Ottawa, has two adult children, Amanda and Evan, and in her spare time enjoys travelling, biking, hiking, cross country skiing, and cooking.

William Gilliland, BA (Hons), LLB, ICD.D

Bill is a corporate lawyer in the Calgary office of Dentons Canada, advising power and energy infrastructure companies on capital markets and M&A transactions, as well as board governance generally. Bill is a leader in ESG finance, representing Dentons Canada, both as a member of the International Capital Markets Association Green Bond Principles since 2014, and as a member of the CSA Group's technical committee, developing the made in Canada Transition Finance Taxonomy following the 2019 recommendations of the Federal Government's Expert Panel on Sustainable Finance. Bill has been a member of the Advisory Council to the Green and Social Bond Principles Executive Committee. Bill's work includes ESG and sustainable finance, including in the areas of green, transition and sustainability bonds. Bill is a co-leader of Dentons Canada's Sustainability Committee and leads Dentons Canada's client-facing ESG practice. Bill has authored a publication on board responsibilities for climate-related disclosure.

Bill grew up in Winnipeg and has a BA (Hons) degree from Queen's University and an LLB degree from Dalhousie University. He holds the ICD.D designation from the Institute of Corporate Directors and has completed the Board Oversight of Climate Change and Board Oversight of Strategy Courses. Bill currently is board chair of Wellspring Alberta, a charity providing cancer support services across Alberta, and has been on the board of Biathlon Canada and other volunteer-based organizations. Bill and his wife Lavina have been very active supporting Ukraine evacuees arriving in Calgary. Along with their son and daughter, Bill and Lavina enjoy outdoor activities including road and gravel cycling, cross-country skiing and hiking.

Hae-Bin Jung B.Th, MDiv, MTS

Hae-Bin Jung was born in South Korea, and graduated from Hanshin University in Seoul, where he earned B.Th (Bachelor of Theology) and M.Div (Master of Divinity) degrees. He was ordained in 1998 by the Presbyterian Church in the Republic Korea (P.R.O.K.) which has a mutual partnership with the United Church of Canada. He came to Canada in 2001, studied M.T.S. (Master of Theological Studies) at Emmanuel College and was admitted to the United Church of Canada in 2008.

Having served Meadowvale Korean United Church and Alpha Korean United Church for 20 years, he is now serving Wesley Mimico United Church in Toronto. He is also serving the Committee on Asian/North American Asian Theologies at Emmanuel College and the Korean Network in the United Church of Canada. As one of two members-at-large of the Pension Board, Hae-Bin not only strives to convey the various interests and opinions of members to the Pension Board, but his lived experiences as a racialized person enable him to engage issues with a particular lens of diversity.

Alison McKay, BA, BAdmin, CPA, ICD.D

Alison McKay leads a team of professionals who administer the largest defined benefit pension plan in Saskatchewan, providing retirement income security for the province's healthcare workers. As Chief Executive Officer of the Saskatchewan Healthcare Employees' Pension Plan (SHEPP), she works with the Board of Trustees to establish the strategic direction of the pension plan, which serves over 60,000 members and 50 participating employers, managing over \$10 billion in assets. Alison was appointed CEO of SHEPP in 2014, following six years with the organization in various senior leadership roles including Interim CEO, Chief Financial Officer, Director of Finance and Administration and Operations Manager. Before joining SHEPP she held various pension administration and financial management roles with SaskTel and SaskEnergy. Alison is a big supporter of the Pension Industry and also volunteers her time as a member of the Board and the Pension Committee of the Victorian Order of Nurses (VON) and as a member of the Canadian Investment Review Board. Alison is a Chartered Professional Accountant and has a Bachelor's degree in both Mathematics and Administration from the University of Regina. In addition, she has completed the ICD-Rotman Directors Education Program.

Katharine Preston MBA, B.Eng

As Vice President, Sustainable Investing, Katharine Preston is responsible for leading OMERS Sustainable Investing team. In this role, she leads the development and advancement of OMERS approach to Sustainable Investing and most recently, OMERS Climate Action Plan. The world class team supports OMERS with implementing its sustainable investing strategy of integration, collaboration, and engagement across the enterprise. To achieve this objective, Katharine and the team work closely with OMERS investment, risk, finance, and communications teams on matters such as ESG integration, climate risk, stakeholder communications and reporting.

Working in the pension industry for more than 15 years, Katharine previously served as Director, Responsible Investing at OPTrust, an Ontario-based public sector pension plan. At OPTrust, Katharine was instrumental in defining a strategy for integrating ESG factors into investment practices and leading the development of a Climate Change Action Plan. Prior to joining OPTrust, Katharine held positions with Innovest Strategic Value Advisors (now part of MSCI) and Stantec Inc.

Katharine currently serves on the Pension Board for the United Church of Canada's Pension Plan; the Investment Committee for the University of Guelph and recently completed a final term on the board of the Pension Investment Association of Canada (PIAC). Katharine also sits on the Canadian Coalition for Good Governance's Environment & Social Committee and chairs the Investor Leadership Advisory Panel of Climate Engagement Canada.

Katharine holds a Bachelor of Engineering, Civil and Environmental Engineering from McGill University, as well as an MBA from the Schulich School of Business, York University. She also holds a Certificate in Fundamentals of Alternative Investments from the Chartered Alternative Investment Management Analyst Association (CAIA).

Thea Sheridan-Jonah

Thea Sheridan-Jonah is a full-time undergraduate student majoring in Political Science and minoring in Indigenous Studies at the University of British Columbia on unceded Musqueam, Squamish, and Tsleil-Waututh Territory. Thea is a member of the General Council Executive (GCE) and serves as a GCE representative to the Pension Board. Thea is on the General Secretary Advisory committee. She is also a member of Pacific Mountain Regional Executive, Centennial Planning Committee for Pacific Mountain, and previously served in Horseshoe Falls. She has worked for the United Church GO project for the past three summers on contract as National Coordinator for the Youth Forum, then Climate Motivator and finally Leadership Animators program. Outside of the United Church Thea is especially passionate about harm reduction, decolonization, climate justice, and global solidarity. At UBC for the past two years she has worked as the Substance Use Health Project Assistant at the UBC Wellness Centre, President of the Vancouver Chapter of Canadian Students for Sensible Drug Policy (CSSDP) and is a founding member of the UBC Harm Reduction Coalition. She served on the national Board of Directors for CSSDP as treasurer for two years and is currently serving as the national chair. Recently she was elected to join the Board of Directors of Pivot Legal Society in Vancouver and is serving as treasurer. Thea is passionate about working within and outside of our systems to advocate and make change rooted in community care and radical love.

Anne Soh (Chair), FSA, FCIA ICD.D

Anne Soh retired from her position as Vice President and Plan Actuary at the Ontario Municipal Employees Retirement System (OMERS) in January 2023. An executive with over 30 years of experience in the pension and benefits industry, Anne advised the OMERS boards of directors on plan funding and sustainability matters, overseeing the in-house actuarial department. Before joining the United Church Pension Board, Anne chaired the Pension Plan Advisory Committee from November 2013 to December 2020. She also serves on the Board of Directors and the Finance and Audit Committee of Canada's National Ballet School. In her cottage community, she is treasurer of the Sturgeon Point Golf Club. Anne is a Fellow of the Canadian Institute of Actuaries and has an Hons. Bachelor of Science degree from the University of Western Ontario. She is also a graduate of the ICD – Rotman Director Education Program.

Pension Plan Advisory Committee (PPAC)

Juan Diz

Juan Diz joined the Pension Plan Advisory Committee in 2021. Juan is Vice President, Pension Solutions Group at the Healthcare of Ontario Pension Plan – HOOPP, a jointly sponsored defined benefit pension plan with over \$100 billion in assets under management. In his IT leadership role, Juan oversees the management of systems that provide services for all HOOPP Members, Employers and Staff. Juan joined HOOPP in July 2013 and has been in his current role since January 2017. Juan holds a BA in Mass Communications and International Relations from York University. Juan has been in the technology industry for over 20 years in various leadership roles with large Canadian financial institutions.

James Fera B.Sc, LLB

James Fera is the Director, Legal Affairs at the Colleges of Applied Arts and Technology Pension Plan (CAAT), an Ontario registered jointly sponsored pension plan. With over 15 years of experience practicing pension and benefits law at both major consulting and law firms, James advises CAAT on matters relating to the operation and administration of the plan as well as mergers with other defined benefit pension plans. James holds a Bachelor of Arts in political science and an LL.B. from Osgoode Hall Law School.

Audrey Forbes, BAS, CEBS, MPA

Audrey Forbes is a recently retired pension plan administration executive, with over thirty-five years of multi-plan experience in the defined benefit pension plan sector. In her most recent role, she oversaw the full range of administration for over 100,000 members and retirees. Ms. Forbes holds a master's degree in public administration from Queen's University, a bachelor's degree in business administration from York University and is a Certified Employee Benefits Specialist (CEBS). She recently co-authored a children's book, serves on several local boards, and volunteers within her local community.

Corbin MacGillivray, BSc, ASA

Corbin MacGillivray is a Vice president, Benefit Payments for the Northern Trust Canada Asset Servicing, a global leader in institutional financial services. In his operations leadership role, Corbin oversees the Benefit Payment operations for Northern Trust in Canada which serves 85,000 retirees and is responsible for the record keeping and systems applications that support these retirees and their administrators. Corbin has over 15 years of experience in all facets of the pension industry. He has extensive experience in custody, paying agency, (actuarial) pension consulting and administration. Prior to joining Northern Trust, Corbin was an actuarial pension consultant at a global HR outsourcing firm.

Corbin holds a Bachelor of Science (actuarial science) from Western University. He is an Associate of the Society of Actuaries (ASA).

Peggy McCallum, BA (Hons Journalism), LLB, C. Dir.

Peggy McCallum joined the Pension Plan Advisory Committee in 2023. She is a former partner and currently counsel at the Fasken law firm, where she served as chair of the pension and employee benefits law group for several years. She was previously senior legal counsel for the former Pension Commission of Ontario. She has been practising pension law since her call to the Ontario Bar in 1985. Peggy was a member of the Sponsors Committee of the Colleges of Applied Arts and Technology (CAAT) jointly sponsored Pension Plan for 12 years. She has served two terms as Chair of the Ontario Bar Association's Pension and Benefits Section and participated in various industry groups such as the Association of Canadian Pension Management. She is a director of the Financial Services Regulatory Authority of Ontario and of the Peterborough Regional Health Centre. She has received her Chartered Director designation from the Directors College at McMaster University.

Laura Newman, FCIA, FSA

Laura Newman retired after over 30 years as a senior retirement consulting actuary in Willis Towers Watson's Toronto office in 2020. Her clients included several large jointly-sponsored pension plans and other organizations in the broader public sector. In addition to holding the role of external actuary, she provided strategic consulting advice on the funding, accounting, investment and design of her clients' retirement arrangements. She held several internal leadership roles over the years focusing on managing and developing colleagues and the operational aspects of Willis Towers Watson's retirement business in Canada. Laura has extensive volunteer experience in the actuarial community including as a member of the Canadian Institute of Actuaries' Actuarial Standards Board. She is a recipient of the CIA's gold certificate of merit in recognition of her many professional contributions over the years.

Kevin Pyo FSA, FCIA

Kevin Pyo joined the Pension Plan Advisory Committee in 2021. Kevin is a Fellow of the Canadian Institute of Actuaries (2008) with over 25 years of pension and benefits industry experience. Currently, Kevin is VP, Global Pension, Benefits and Wellbeing at CIBC. His accountabilities include oversight of all matters related to CIBC's pension and benefits plans from operations to governance reporting to the CIBC Board of Directors. Prior to CIBC, Kevin was a consulting actuary at various pension consulting firms in Canada assisting plan sponsors/administrators with a wide range of matters including plan design, strategy and funding. Kevin also served as a member of the Federal Council of the Association of Canadian Pension Management, who provides input to regulators on legislative matters including funding regulations, plan operations and plan member communications. Kevin is passionate about improving the financial wellbeing of Canadians including financial literacy, financial resiliency and preparedness for the future. In his local church community in Toronto, Kevin is also an active member serving in several ministries.

Helen Redmond, BA (Hons)

Helen has been working in Ontario defined benefit pension plan administration for over 20 years, and as Vice President of Pension Administration she leads the cross-functional member service team who administers the Toronto Transit Commission Pension Plan (TTCPP). In addition, Helen serves as Corporate Secretary to the TTC Pension Plan Board of Directors, where she is responsible for ensuring adherence to proper governance, policy best practice and legislative compliance standards. Helen contributes to establishing and delivering on TTCPP's strategic goals and initiatives and is acting as the Project Manager for a large-scale multi-year pension administration software implementation upgrade, scheduled for completion in 2027. Prior to joining TTCPP, Helen started her pension administration career with Ontario Pension Board in various data analysis and member service roles. Helen is passionate about providing excellent customer service to her plan's active and retired membership and advocates for creating concise and engaging member educational material at the critical times in their retirement journey. Helen holds an Honours BA from the University of Toronto and a Pension Plan Administration Certificate (PPAC) from Humber College, and lives with her husband and their two teenage boys.

Jacques Tremblay (Chair), FCIA, FSA, MAAA

Jacques Tremblay is a Partner with the Toronto Actuarial Consulting practice of Oliver Wyman, an operating company of Marsh & McLennan Companies.

Mr. Tremblay has over 30 years of experience in the Canadian life insurance industry. This experience covers, IFRS 17, financial reporting, solvency testing, product pricing, independent peer review, business appraisal, embedded value securitization, demutualization, liquidation, and expert witness. Mr. Tremblay is currently the Appointed Actuary for four clients. A Fellow of the Canadian Institute of Actuaries (CIA) since 1992, Mr. Tremblay is a Past President of the CIA (2014-2015) and a member of the International Actuarial Association (IAA) Executive Committee (2020-). Mr. Tremblay is a member of the Board of Directors for The Empire Life Insurance Company (Canada) (2014-), is Vice-Chair of the Board (2020-) and is Chair of the Risk and Capital Committee (2015-).

Investment Committee

Adam Buzanis, CFA

Adam is Senior Director, Private Equity at CAAT Pension Plan and oversees all aspects of the Plan's global private equity portfolio, with a focus on origination, execution and portfolio management. Adam brings over 18 years of investment management experience with a specialization in private asset classes and alternative investments. Adam serves on several corporate boards and the advisory committees for partnerships within CAAT's private equity portfolio. Adam is a CFA charterholder and earned a Master of Finance degree from the Smith School of Business at Queen's University.

Cathy Carlin, CFA

Cathy has over 30 years of experience in the investment management industry, specializing in public equities. Cathy spent 25 years at OMERS, a defined benefit pension plan, starting as a public equity analyst and retiring from executive level Senior Managing Director role, leading the global equity team. Prior to OMERS, Cathy worked for 5 years at TD Wealth, where she consulted with investment advisors in constructing portfolios for high-net-worth clients. Cathy is a CFA charterholder and holds a Bachelor of Business Administration degree from Wilfrid Laurier University. She is currently an independent member on the Investment Review Board of Nicola Wealth Management. She is also a trustee of the Toronto Symphony Orchestra Foundation, was formerly on the Board of CODE (an organization dedicated to children's literacy in Africa) and chaired the board of CODE Foundation. Cathy and her husband have two grown sons and a Portuguese Water Dog, all of whom love to spend time at the lake.

Doug Chau, CFA, PRM, CQF, M.Sc., PhD

Doug is the Chief Risk Officer and Head of Research at the University of Toronto Asset Management Corporation (UTAM). Doug joined UTAM in 2017 and is responsible for asset allocation modelling, risk management and measurement, research, and performance analysis. Previously, Doug worked for 15 years at OPTrust, where his responsibilities included developing strategic asset allocation models, researching risk factors, completing internal and external investment strategy evaluations, implementing performance and ALM systems, and developing a set of quantitative tools to inform investment decisions.

Doug holds a PhD in Finance from the EDHEC Business School, a Master's degree in Science with a specialization in Finance (M.Sc.) from the University of Reading, a Master's degree in Statistics (M.Sc.) from the University of Toronto, and an honours undergraduate degree in Mathematics and its Applications (B.Sc. Hons) from the University of Toronto. Doug holds the Chartered Financial Analyst (CFA), Professional Risk Manager (PRM) and Certificate in Quantitative Finance (CQF) designations.

Samantha Cleyn, CFA, MBA

Samantha joined Bank of Montreal Global Asset Management (BMO GAM) in 2023 as Managing Director, Head of Institutional Sales and Service where she is responsible for building and implementing a channel strategy, leadership and direction for BMO GAM's institutional business. Her previous experience includes leading institutional efforts nationally at T. Rowe Price Canada and prior to that, 11 years as an investment consultant with several firms including Mercer Canada and Pavilion Advisory Group. Samantha earned both an MBA and a Bachelor of Commerce, Finance from Concordia University and is a CFA charterholder.

Andrew (Andy) Greene, MA, CIM, CAIA (Chair)

Andy Greene brings over 25 years of investment experience in both the U.S. and Canada as a plan sponsor, portfolio manager, and investment consultant to his role on the Investment Committee. Andy is currently serving as the Chief Investment Officer for the Toronto Transit Commission (TTC) Pension Plan, a \$9bln defined benefit plan. Prior to this Andy spent eight years at OPTrust, as Director, Public Market Investments overseeing public equities, fixed income and hedge funds. Before his work at OPTrust, Andy worked at Northern Trust, the University of Wisconsin Foundation and Willis Towers Watson. He holds an MA in Applied Economics from Binghamton University and a BA in Economics from Ithaca College, the Certified Investment Manager (CIM) and Chartered Alternatives Analyst (CAIA) designations. He is a member of the CFA Institute, CFA Society of Toronto, and the Pension Investment Association of Canada (PIAC). In addition to his service to the Pension Plan of The United Church of Canada, Andy also serves on the Investment Committee for the York University Pension Plan. Andy lives in Toronto with his wife and three children.

Lori Hall-Kimm

Lori is currently the Head of Global Private Equity at Healthcare of Ontario Pension Plan (HOOPP). Since joining in 2022, Lori leads the Private Equity team and is responsible for the strategic, operational and global investment activities for private capital across multiple strategies, including buyouts, secondaries, venture/growth and private credit. Prior to joining HOOPP, Lori spent six years with CPP Investments, most recently as Managing Director, Direct Private Equity, where she led the team responsible for the Consumer sector. Previously, she spent almost 11 years in the Private Capital team at Ontario Teachers' Pension Plan, helping establish their London office and leading their European fund and co-investments and also worked in investment banking at Goldman Sachs. Lori holds a BBA (Honours) from the Schulich School of Business at York University and an MBA from Columbia Business School.

Sean Macaulay, CFA

Sean Macaulay has a breadth of experience in all aspects of operations of pension asset management. In 2020, he joined EagleTree Capital, ULC as an Operating Partner and is EagleTree's Chief ESG Officer. Previously, he was the head of private equity at the Investment Management Corporation of Ontario (IMCO) and was formerly the head of private equity at the Ontario Pension Board (OPB), an IMCO founding client. While at IMCO/OPB, Sean led IMCO's/OPB's private equity investments, served as a board member or advisor to numerous portfolio companies, led OPB's asset/liability studies, and developed OPB's initial external public markets manager review process, among other accomplishments. Prior to IMCO/OPB, Sean was a senior investment professional for the University of British Columbia Investment Management Trust and the head of the Vancouver investment consulting practice for Hewitt Associates. He received his Bachelor of Commerce (Honours) with Distinction from the University of Manitoba (1994), majoring in Actuarial Mathematics and Research/Operations Management and is a Chartered Financial Analyst (2003). Sean lives in Newmarket, ON, with his wife and two children.

Deborah Ng, CFA, M. Finance

Deborah Ng is the Head of ESG and Sustainability at Grantham, Mayo, Van Otterloo LLC (GMO) and leads the firm's sustainability and climate change strategy. She is responsible for key deliverables including research and thought leadership, integration frameworks, and corporate engagement. Prior to joining GMO in 2022, she was the Head of Responsible Investing at Ontario Teachers' Pension Plan (OTPP) and was part of its Strategy & Asset Mix team, where she focused on the research, evaluation, and introduction of asset allocation strategies.

Ms. Ng is a member of the Global Reporting Initiative (GRI) Standards Board, the Investment Committee of the United Church Pension Plan and is a past board member of the Global Real Estate Sustainability Benchmark (GRESB). Ms. Ng earned her Bachelor of Commerce and Master of Finance from the University of Toronto. She is a CFA charterholder.

Steve Smith

In his current role as Head of Global Infrastructure, Stephen is responsible for overseeing all infrastructure investments and related portfolio activities. His infrastructure experience includes airports, toll roads, communication, and power generation and transmission. He joined HOOPP in 2010 as a Partner, Private Equity (PE) and played an active role in expanding the PE portfolio for more than nine years and continues as a Board member of one of HOOPP's largest PE investments. Prior to joining HOOPP, Stephen was a Partner of KPMG LLP and a Senior Vice-President and Director of KPMG Corporate Finance, where he advised corporate clients on business development, strategic acquisitions, financing and divestitures. He received his Bachelor of Commerce from McMaster University and also holds Chartered Professional Accountant and ICD.D designations.

Kathleen Wylie, CFA

Kathleen Wylie has worked for over 30 years in the financial industry. In 2024, she joined Q Wealth Partners as Head of External Manager Research. Prior to Q Wealth, Kathleen worked at a Calgary-based asset manager with a focus on business development and client relations. Previously, Kathleen had 18 years of manager research experience including three years at CIBC Asset Management as Executive Director in the Investment Management Research group with responsibility for leading a team of manager research analysts. Prior to that she worked for 15 years on the buy side at Russell Investments as Head of Canadian Equity Manager Research where she specialized in researching and ranking Canadian equity managers. Through-out her career, she has been an in-demand public speaker and appeared regularly on BNN TV to discuss the Canadian active management environment. Prior to Russell Investments, Kathleen held a variety of economist roles on Bay Street, where she made use of her Bachelor and Master degrees in Economics, both from University of Waterloo. She is also a Chartered Financial Analyst. Kathleen is a member of Women in Capital Markets, and is involved in the "Up the Down Market" fundraising event in support of the Down Syndrome Resource Foundation. Kathleen is married and has two grown children. The family enjoys travelling together, with Greece, Paris, Las Vegas, and Jamaica among their favourite destinations.