Clive Adamson is the Director of Supervision in the Conduct Business Unit which is the pre-cursor to the Financial Conduct Authority. Previously he was the Director of the Major Retail Groups Division within the FSA, which was responsible for the supervision of the main UK banking and insurance groups.

Before that, he was a Senior Advisor at the FSA, having initially been appointed to the Bank of England before the formation of the FSA. He has over 20 years’ experience in wholesale and investment banking, initially at Citigroup, followed by 15 years at the Bank of America. There he was Senior Vice President and Regional Head, with responsibility for client coverage and regional governance across the bank’s businesses in UK and North Europe.

Clive was also a past Council member of the British Bankers’ Association and Chair of the American Banking and Securities’ Association of London.

Geoff Balzano is chief executive officer of Morningstar in the UK, where he is responsible for strategy and operations for all of Morningstar’s business lines in the UK market.

Since relocating to London in 2007, Geoff has overseen the rapid growth of Morningstar UK, doubling the number of staff working in, or supporting the UK business, to some 300. He has also overseen several company acquisitions that have extended Morningstar’s data and research capabilities available to the UK market.

Geoff has lead Morningstar’s response to a number of industry challenges, including the readying of the company’s adviser software products and research for the UK’s Retail Distribution Review, and driven Morningstar to become the company of choice for the provision of investment information, confirmed by the company’s appointment as official sector monitor to the IMA, as well as statistics provider to the Financial Times.

Geoff was previously vice president of enterprise solutions for Morningstar’s Adviser business, where he was responsible for strategy, development, and product marketing for all enterprise software products including the Adviser Workstation™ Enterprise Edition, a Web-based investment planning platform that integrates asset allocation, portfolio analysis and monitoring, investment research, and investment planning for financial advisers.

Before joining Morningstar in 2001, Geoff worked for Accenture in the technology solutions development area. He also has considerable online product management experience.

Geoff holds a bachelor’s degree in history and Asian studies from Indiana University and a master’s degree in business administration with a concentration in finance and marketing from the University of Chicago Graduate School of Business.

Jackie Beard joined Morningstar in September 2008 as director of fund research for Morningstar UK and in her current role is leading the launch of Morningstar’s move into qualitative research on closed-end funds for the UK market. Prior to that, Jackie headed the roll out of Morningstar’s qualitative fund research and ratings for funds available for sale to UK investors.

Before joining Morningstar, Jackie spent seven years at Forsyth Partners where her role included fund research, the management of the group’s broker client funds and the development of proprietary research and information tools.

Jackie started out in the financial services industry in 1991, initially at private bank Hill Samuel before moving to stockbrokers Albert E Sharp and ultimately fund research. She is a fellow of the Chartered Institute of Securities and Investment, and an MSI Diploma holder.
Kim joined Martin Curie in October 2010 as head of global emerging markets, a role he held at SWIP since 1998, when he established and recruited that company's global-emerging-markets team. At SWIP, Kim was responsible for £2.2 billion in funds under management and was lead portfolio manager on the firm's global emerging markets equity fund. He also specialised in energy-sector research. Before joining SWIP, Kim established and managed two asset-management ventures in Spain: Eagle Star Inversiones and, earlier, FG Gestión. He began his investment career as a portfolio manager for Edinburgh Fund Managers in 1987. Kim is fluent in Spanish, Portuguese, French and Greek, and intermediate in Russian, Italian and German.

Nick Clay of BNY Mellon boutique Newton Investment Management manages global equity and multi-asset portfolios, is a member of Newton's global investment team and lead manager of the BNY Mellon Global Equity Higher Income Fund. He is a member of a number of investment groups, including the operating committee and the investment risk group. Prior to joining Newton in 2000, Nick acquired a range of experience as a UK equities manager at Morley Fund Management and as an analyst at Sun Alliance. Nick is an associate member of the UK Society of Investment Professionals.

David M. Blanchett, CFA is the Head of Retirement Research for Morningstar's Investment Management division in Chicago. He develops new methodologies related to strategic and dynamic asset allocation, simulations based on wealth forecasting, and other investment and financial planning areas for the investment consulting group. He also serves as the Chairman of the Advice Methodologies investment sub-committee. David has authored more than 40 articles that published in ASPPA Journal, Investment News, the Journal of Financial Planning, the Journal of Index Investing, the Journal of Indexes, the Journal of Indexes, the Journal of Investing, the Journal of Performance Measurement, the Journal of Pension Benefits, and the Retirement Management Journal. He won the Journal of Financial Planning 2007 Call for Papers for research paper on optimal glidepath allocations for retirees and the Retirement Income Industry Association 2012 Thought Leadership Award for research on portfolio withdrawal strategies.

Graham is Head of Investment Marketing, Old Mutual Wealth, responsible for the investment proposition for OMW's UK platforms, and that of its Asian, Middle East and Latin American distribution models. Previously, Graham held roles at Selestia as Head of Investment, M&G as Investment Marketing Manager and Henderson as a Director.

Graham Bentley
Head of Investment Marketing, Old Mutual Wealth

David M. Blanchett, CFA
Head of Retirement Research
Morningstar Investment Management

Kim Catechis
Investment Director, head of global emerging markets

Nick Clay
Investment Manager, Newton Investment Management

Graham Bentley
Head of Investment Marketing, Old Mutual Wealth

David M. Blanchett, CFA
Head of Retirement Research
Morningstar Investment Management

Kim Catechis
Investment Director, head of global emerging markets

Nick Clay
Investment Manager, Newton Investment Management
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Speaker Biographies

Dr. Davies leads a global team of behavioural and quantitative finance specialists, and is responsible for the design and global implementation of Barclays’ Investment Philosophy.

He is an Associate Fellow at Oxford University’s Said Business School, and his first book, Behavioral Investment Management, was published in January. He has authored papers in multiple academic disciplines, and is a frequent media commentator on Behavioural Finance.

His background is in both academia and financial services. He holds an undergraduate degree from the University of Cape Town, an MPhil in Economics, and a PhD in Behavioural Decision Theory, both from Cambridge University.

Greg B Davies, PhD
Managing Director
Barclays - Wealth and Investment Management
Head of Behavioural and Quantitative Investment Philosophy

Stephen Cohen is head of iShares’ Investment Strategies EMEA. His team is responsible for providing clients with in-depth ETF market, portfolio and product analysis – together with insights into global markets and implementation strategies.

He joined BlackRock in 2011 from Nomura where he was Global Head of Equity Linked Strategy, responsible for derivative, convertible and delta-one products.

He has considerable experience as an investment and market analyst, previously working in Japanese Convertibles at ING Barings from 2001-2003. Stephen began his career in UBS Fixed Income in 1996 where he held roles within relative value and hedge fund sales.

In addition, Stephen has been a Director of Enovara, an Irish funds company. He earned a First Class honours degree in Economics from the University of Southampton in 1996.

Stephen Cohen
Head of iShares’ Investment Strategies EMEA

Stewart Cowley joined OMAM in June 2009 from Newton Investment Management where he was Head of Fixed Income and manager of the S&P AAA-rated Newton International Bond and BNY Mellon Global Bond funds.

Prior to this he was Joint Chief Investment Officer and Head of Global Fixed Interest at Hill Samuel Asset Management, having previously been Head of Global Fixed Interest at Invesco Asset Management. He began his career at Donaldson,

Lufkin & Jenrette in 1987 as a fixed income sales trader, before switching to fund management.

Stewart has a BSc in Physics from Manchester University and a DPhil in Physics from Oxford University, and is a Member of the Securities Institute.

Stewart Cowley
Head of Fixed Income, OMAM
Speaker Biographies

**Erin Davis**
Senior Equity Analyst - International Banks, Morningstar Inc.

Erin Davis is a senior stock analyst covering international banks. Before joining Morningstar in January 2006, she spent seven years as a senior analyst at the Federal Reserve Bank of Chicago, where she studied issues affecting banks and payment systems. She holds an MBA from the University of Chicago Booth School of Business and an A.B. in Economics from the University of Michigan.

**Geoff Drabble**
FCAChief Executive
Ashtead Group

Geoff Drabble was appointed as chief executive in January 2007, having served as chief executive designate from October 2006 and as a nonexecutive director since April 2005. Geoff was previously an executive director of The Laird Group PLC where he was responsible for its Building Products division. Prior to joining The Laird Group, he held a number of senior management positions at Black & Decker. Geoff is chairman of the Finance and Administration Committee and a member of the Nomination Committee.

**Stefan Isaacs**
Fund Manager, M&G.

Stefan Isaacs started at M&G in 2001 and was promoted to corporate bond dealer specialising in high yield bonds and euro denominated credit. He joined the fund management team in 2006 as an assistant fund manager covering high yield and European investment grade for M&G’s fixed interest fund range. He was appointed fund manager of the M&G European Corporate Bond Fund in April 2007 and the M&G High Yield Corporate Bond Fund in October 2010. Stefan graduated from Manchester Metropolitan University with a degree in international business and French.

**Richard Kirby**
Director, Property Funds, F&C

Richard Kirby joined the F&C Asset Management plc group ("F&C") in 1990. He has been a fund manager since 1995 and has experience of managing commercial property portfolios across all sectors for open-ended, closed-ended and life fund clients. Richard has been lead manager of the F&C Commercial Property Trust since launch in 2005 where his responsibilities include advising on and implementing property portfolio strategy, sales, acquisitions, asset enhancement and management. He is a director of F&C REIT Property Asset Management and sits on both the Executive Committee and Investment Committee of F&C REIT. He is a Chartered Surveyor and a member of the Investment Property Forum, the British Council of Offices and the British Council for Shopping Centres Managers.
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Speaker Biographies

Guy Monson
Managing Partner & Chief Investment Officer, Sarasin & Partners LLP

Guy joined Sarasin in London in 1984 after receiving a BA from Oxford University followed by an MA in 1990 in Politics, Philosophy and Economics. In 1988 he became manager of Sarasin’s flagship GlobalSar family of balanced investment funds, winning awards for investment performance and risk profile. He has pioneered the use of Thematic Investment in the management of Global Equity portfolios, resulting in the highly successful launch of the EquiSar family of funds in 1996. In 2007 Guy was made a CEO of Sarasin Chiswell and subsequently Managing Partner of Sarasin & Partners LLP. Guy writes regularly in the international financial press and appears on CNBC, Bloomberg and other financial channels.

Holly Mackay
Managing Director of The Platforum

Hungry for some rain and dysfunctional legacy systems, she returned to the UK in 2003. Holly headed up Abbey’s wrap proposition and was appointed the UK Director for Santander’s Allfunds Bank in 2005. She set up The Platforum in 2007. Holly read French and Spanish at New College, Oxford University and holds a graduate Diploma in Applied Finance and Investments from the Securities Institute of Australia. She likes India, red shoes, sauvignon blanc, has a two year old and a four year old and dreams of a good night’s sleep.

Mark Polson
Founder, The Lang Cat

Mark Polson is founder of the lang cat, a specialist platforms and pensions consultancy. The lang cat works with IFAs and providers, helping them develop new propositions, turn marketing strategy into action and articulate their services in such a way that people without financial services degrees have a hope of understanding them. Bit by bit, it aims to make the industry just a little bit less corporate and stuffy and a little bit more human. Mark is a prolific writer, contributor to the trade press and public speaker, even when people ask him not to be.

Holly Mackay
Managing Director of The Platforum

Holly’s platform experience started in 1999 in Australia where she developed and ran investment platforms at Merrill Lynch Investment Managers and Norwich Union. The Platforum analyses direct to consumer platforms, adviser platforms, corporate platforms and European retail platforms. Holly Mackay is the Managing Director of The Platforum which she founded in 2007. Based in London, The Platforum provides consultancy, research and events to the financial services sector with a specific focus on platforms and retail distribution. With a subscriber base of over 10,000 industry professionals, The Platforum is the leading independent commentator on platforms in the UK market.
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Speaker Biographies

Chris Rice joined Cazenove Capital in 2002. He is Head of pan-European Equities, responsible for all aspects of pan-European equity strategy and portfolio construction. He is co-manager of the Cazenove European Income Fund, and lead manager of the Morningstar OBSR Silver-rated Cazenove European Fund. Chris graduated from the University of Salford with First Class Honours in Finance and Accounting, and holds a MPhil in Monetary Economics from the University of Glasgow and is IIMR qualified. Chris is a Director of Cazenove Capital and has 21 years’ investment experience.

Chris Rice
Head of pan-European Equities, Cazenove Capital

Francis joined Brandywine in 2006 where he provides investment ideas, asset allocation advice and strategies for the firm’s global fixed-income and hedge fund products. He was previously a principal in the BCA Research Group, formerly the Bank Credit Analyst. BCA is well known in the investment community for providing high quality and independent top-down macro forecasts and investment strategy. During these years he was also head of global investment strategy and helped drive the firm’s growth and development until it was sold in 2001.

Francis Scotland
Director, Global Macro Research, Brandywine Global Investment Management

Tom, who has 35 years experience in the investment community, has a history of building successful and innovative businesses. He spent two decades with Prudential Bache on three continents, latterly as COO of their International Division with a presence in 16 countries. He subsequently became the MD of Barclays Stockbrokers where he pioneered an industry solution to the handling of the major demutualisations in 1997, introduced the UK’s first fund supermarket and introduced the UK’s second (after Schwab) internet stockbroker. Together with Justin Urquhart Stewart and Graham Stott, he founded 7IM in 2001. As CEO, he has led 7IM as an early, and successful, entrant in both multi-manager and open architecture investment platform markets. More recently 7IM have pioneered multi-asset portfolios using all passive instruments in the UK.

Tom Sheridan
CEO, Seven Investment Management

Terry Smith is CEO of City broker Tullett Prebon and founder of the fund management business Fundsmith. He made his name 20 years ago with the publication of his myth-busting book Accounting for Growth. It got him fired from his job at UBS but established his reputation as one of the shrewdest minds in The City.

Terry Smith
Founder, Fundsmith
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Speaker Biographies

Peter Toogood  
Investment Services Director, Morningstar OBSR

Peter began his investment career in 1988, having graduated with a degree in Accountancy from Exeter University. He joined Sun Life Assurance and was enrolled in the graduate training program where he stayed for two years. He subsequently joined Holden Meehan in London to focus on the provision of independent investment research to support the wealth management team. In 1994 he joined Forsyth Partners as a senior mutual researcher covering UK and global equity markets as well as fixed income. He became Head of Research at Forsyth Partners in 1996 and was in charge of a team of 24 at its peak. He was made Chief Investment Officer at Forsyth Partners in 2000 and managed a multi-asset format assets in excess of £1 billion. He formed the Forsyth-OBSR ratings service with Richard Romer-Lee in 2002, and joined OBSR when the Forsyth advisory business was sold to OBSR in 2008. Today, Peter is responsible for OBSR's advisory services, which provide asset allocation and fund selection solutions for a variety of clients in the UK and Internationally. OBSR was acquired by Morningstar in 2010.

Stephen Snowden  
Investment Manager, Fixed Income, Kames Capital

Stephen re-joined Kames Capital in July 2011 from Old Mutual Asset Management, where he managed the Corporate Bond Fund from 2004. Stephen started his career with us in 1994, initially focussing on equities before moving to the fixed income team and managing the Sterling Corporate Bond and High Yield Bond funds. Stephen has a first class honours degree BSc Finance and an MSc Finance from Queens University Belfast and is an Associate member of the UK Society of Investment Professionals (ASIP).

Tim Steer  
Partner and Fund Manager, Artemis

After graduating from the University of London, Tim qualified as a chartered accountant. While working for Merrill Lynch and HSBC, Tim established himself as one of the most successful analysts in the small companies sector, with Extel surveys ranking him among the top analysts in his sector from 1993 to 1995. In 2001, Tim joined New Star Asset Management and took responsibility for the New Star UK Alpha Fund and the New Star UK Gemini Hedge Fund from launch in December 2003. Tim joined Artemis in June 2009 to manage the Artemis UK Growth Fund and the Artemis UK Hedge Fund.

Ian Taylor  
CEO, Integrated Financial Arrangements plc

Ian Taylor is the CEO of Integrated Financial Arrangements plc, which operates the Transact wrap service. Prior to joining Transact in 1999, Ian worked for seven years at an asset management business and for five years at a life office.

Peter Toogood  
Investment Services Director, Morningstar OBSR

Peter began his investment career in 1988, having graduated with a degree in Accountancy from Exeter University. He joined Sun Life Assurance and was enrolled in the graduate training program where he stayed for two years. He subsequently joined Holden Meehan in London to focus on the provision of independent investment research to support the wealth management team. In 1994 he joined Forsyth Partners as a senior mutual researcher covering UK and global equity markets as well as fixed income. He became Head of Research at Forsyth Partners in 1996 and was in charge of a team of 24 at its peak. He was made Chief Investment Officer at Forsyth Partners in 2000 and managed a multi-asset format assets in excess of £1 billion. He formed the Forsyth-OBSR ratings service with Richard Romer-Lee in 2002, and joined OBSR when the Forsyth advisory business was sold to OBSR in 2008. Today, Peter is responsible for OBSR's advisory services, which provide asset allocation and fund selection solutions for a variety of clients in the UK and Internationally. OBSR was acquired by Morningstar in 2010.

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Speaker Biographies

Christopher Traulsen joined Morningstar in 1997 and is currently director of fund research for Europe.
Christopher has specialised in qualitative fund analysis for the past decade, and previously led Morningstar’s coverage of large fund houses such as Fidelity and Legg Mason.
Before taking on his present role, Christopher authored Morningstar’s monthly Fidelity report; launched the firm’s coverage of ETFs; and co-developed Morningstar’s Stewardship Grade for Funds.
Christopher holds bachelors degrees from the University of California at Berkeley, and a master’s degree from the University of Chicago.
He is a CFA charterholder.

Ewen Cameron Watt, Managing Director and Portfolio Manager is Chief Investment Strategist of the BlackRock Investment Institute a global platform that leverages BlackRock’s global expertise to generate insights that augment the firm’s ability to create a better financial future for our clients. Mr Cameron Watt chairs BlackRock’s Central Strategy Group and leads internal events and debate between investment leaders. Mr Cameron Watt is also a member of the BlackRock Multi-Asset Client Solutions (BMACS) group where he is lead portfolio manager of the Fund of Alternatives product, a portfolio manager of the Dynamic Diversified Growth strategy and a member of the Investment Oversight Committee for Fiduciary Funds.
Mr. Cameron Watt’s service with the firm dates back to 1995, including his years with Merrill Lynch Investment Managers (MLIM), which merged with BlackRock in 2006. At MLIM, he was chair of MLIM’s Central Strategy Group and was responsible for asset allocation and multi-manager products, the economics team and investment research. He also managed a range of active asset allocation-based funds and was a member of MLIM’s Global Investment Committee. Prior to joining MLIM, Mr. Cameron Watt was a partner in a firm of London stockbrokers. He began his financial career in 1978 and joined SG Warburg Group in 1985.
Mr. Cameron Watt earned a BA degree, with honours, in modern history from Oriel College, Oxford University in 1978.
Mr. Cameron Watt served in a personal capacity as an independent advisor to the Bank of England Pension Fund from 2000-2006 and from 2010 as an external member of the Investment Committee of All Souls College, Oxford.