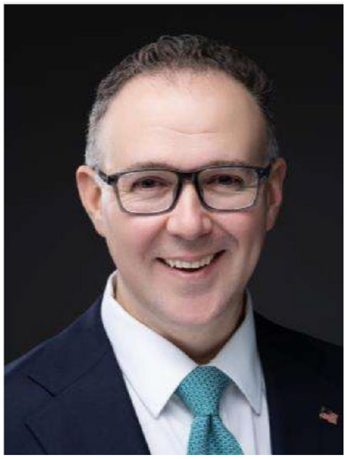
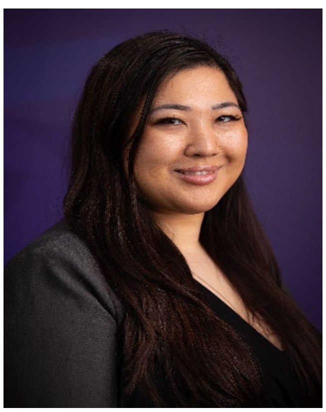
SWFA CFA Industry Panel

"The New Frontiers of Financial and Investment Management"

Panelists:



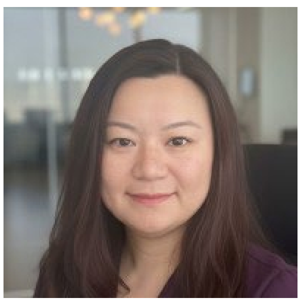
Chris Huntley is the Vice President and Senior Portfolio Advisor at Northern Trust. Chris' main responsibilities include providing sophisticated investment strategies and product solutions within a Goals Based Framework to ultra-high-net-worth clientele, including corporate executives, successful entrepreneurs, private foundations, and 501(c)(3) entities. Chris is also responsible for driving business results, as he is tasked with developing new and expanding current relationships. Prior to joining Northern Trust, Chris worked at Simmons Bank as a Senior Portfolio Manager. There he developed asset allocation strategies for individual families, endowments and other charitable organizations. He previously held positions with The Mather Group in Chicago, IL and Houston, TX after beginning his career at Central Trust Company. Prior to his career in finance, Chris served our nation honorably in the United States Air Force. Chris earned dual bachelor's degrees in finance and risk management & insurance, as well as an MBA from Missouri State University. Chris is a Chartered Financial Analyst (CFA) and has obtained the Certified Financial Planner™ (CFP®) certification. Chris is a currently a board member of the CFA Society Dallas/ Fort Worth. He sits on the Finance Committee at Lovers Lane UMC and is Vice Chair of the board at Walnut Hill UMC. He has been involved in the VFW, Rotary International, and volunteered with Big Brothers Big Sisters of the Ozarks and the American Red Cross.



Roxanna Islam is the Head of Sector & Industry Research at TMX VettaFi, where she is primarily responsible for equity, alternative, and digital asset research. Prior to joining TMX VettaFi, she spent several years in sell-side equity research at Stifel where she covered freight transportation, logistics, and electric vehicle stocks. She also spent the beginning of her career at Wells Fargo in closed-end fund and ETF research. Roxanna is a recognized voice in the investment community, frequently speaking at major industry conferences and appearing on webcasts, podcasts, and live financial television. Her insights are often featured in media outlets including Bloomberg, Fox Business, The Wall Street Journal, Reuters, CNBC, US News, and Financial Times. Outside of the office, Roxanna is actively involved in the community. She serves on the Board of Directors of CFA Society of Dallas/Fort Worth, the Finance Committee of Junior League of Dallas, and is an alumna of the Business Council for the Arts Leadership Institute. Roxanna is a CFA Charterholder, a CAIA Charterholder and has earned the CFA Institute Sustainable Investing Certificate. She holds both a BBA in Finance and a BA in Plan II Honors from the University of Texas at Austin.

Grant Jackson is a Managing Director and Portfolio Manager for Invesco's Global Real Estate Securities team. He has 21 years of experience with Invesco with primary focus on US publicly traded Real Estate. His investment responsibilities include fundamental research, market forecasting, portfolio construction, and risk management across a variety of actively and passively managed publicly REIT products. He conducts primary research across numerous real estate property types and regularly collaborates with board members and senior leadership of publicly traded REITs. Prior to joining Invesco, Mr. Jackson worked in the management consulting practice for PricewaterhouseCoopers for three years. During his consulting career he provided business development, strategic advice, and technical expertise for fortune 500 companies as well as startups. He helped provide customized solutions for five primary clients involving ERP software, custom applications, and various data management solutions. Mr. Jackson earned a Bachelor of Science degree in Mechanical Engineering from the University of Texas at Austin and a Master's degree from Southern Methodist University's Cox School of Business. He is a CFA® charterholder.

MODERATOR:



Ran Lu-Andrews is an Associate Professor of Finance and the Associate Dean of Undergraduate Studies of School of Management at California Lutheran University. Ran studied Financial Engineering at Renmin University of China in Beijing. She earned her PhD in Finance from University of Cincinnati in 2011. Her research interests include corporate finance and real estate. She has published her research in premier academic journals such as Real Estate Economics, Journal of Real Estate Finance and Economics, Sustainability, and Journal of Housing Economics. Before joining Cal Lutheran, Ran taught a variety of finance and real estate courses at University of the Pacific, Menlo College, and University of Connecticut. At University of Connecticut, Ran was also involved in their Real Estate Center. She hopes to bring her diverse background and experience in teaching and research to Cal Lutheran and contribute to the local community. She is also Chartered Financial Analyst (CFA).