Parametric

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March 27, 2025

Parametric Portfolio Associates LLC
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Ben Adams

3600 Minnesota Drive, Suite 200
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Telephone: (952) 737 6837
ben.adams@parametricportfolio.com

Year of Birth: 1989

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota, Duluth (B.B.A. in Finance, 2011)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Associate Portfolio Manager, Parametric (03/19 to 01/23)

Disciplinary Information

Mr. Adams does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Adams is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Adams receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jason Nelson, Portfolio Manager, supervises Mr. Adams and is responsible for monitoring the advice he provides to clients. Mr. Nelson can be reached at (952) 767 7871.

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Edward Afeiche

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Edward.afeiche@parametricportfolio.com

Year of Birth: 1997

Educational Background and Business Experience

Educational Background: University of Washington (B.A., Economics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Associate Portfolio Manager, Parametric (09/22-12/24); Performance Analyst, Parametric (03/20-09/22)

Disciplinary Information

Mr. Afeiche does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Afeiche is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Afeiche is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Sam Hodge, Senior Portfolio Manager, supervises Mr. Afeiche and is responsible for monitoring the advice Mr. Afeiche provides to clients. Mr. Hodge can be reached at (206) 405-3006.

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Alexander Amado

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Telephone: (617) 672-6470
alexander.amado@parametricportfolio.com

Year of Birth: 1990

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: University of Massachusetts, Lowell (B.S.B.A. Finance & Business Management)

Business Experience: Vice President, Portfolio Management and Trading, Parametric Portfolio Associates LLC (01/22 to Present); Senior Quantitative Portfolio Associate, Eaton Vance Management (2017 - 2021)

Disciplinary Information

Mr. Amado does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Amado is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Amado receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients..

Supervision

Michael Nappi, Director, Portfolio Management and Trading, supervises Mr. Amado and is responsible for monitoring the advice he provides to clients. Mr. Nappi can be reached at (617) 672-8466.

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Macki Anderson

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Minneapolis, MN 55435
Telephone: (952) 767 7864
macki.anderson@parametricportfolio.com

Year of Birth: 1992

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota (B.S. Business, Finance, 2013)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (11/19 to Present)

Disciplinary Information

Mr. Anderson does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Anderson is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Anderson receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Dan Wamre, Director, Investment Strategy, supervises Mr. Anderson and is responsible for monitoring the advice he provides to clients. Mr. Wamre can be reached at (952) 767 7710.

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Brendon Babcock

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Minneapolis, MN 55435
Telephone: (952) 737 6814
Brendan.babcock@parametricportfolio.com

Year of Birth: 1996

Educational Background and Business Experience

Educational Background: University of Minnesota, Duluth (B.A. in Finance, 2019)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (1/23 to Present); Senior Investment Analyst, Parametric (1/22-1/23); Investment Analyst, Parametric (6/19-1/22)

Disciplinary Information

Mr. Babcock does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Babcock is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Babcock receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Zach Olson, Portfolio Manager, supervises Mr. Babcock and is responsible for monitoring the advice he provides to clients. Mr. Olson can be reached at (952) 767 6850.

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Charles Bahnson

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Charles.bahnson@parametricportfolio.com

Year of Birth: 1995

Educational Background and Business Experience

Educational Background: St. Olaf College (B.A.)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (04/22 to Present); Research and Due Diligence Analyst, U.S. Bank (02/09-04/22)

Disciplinary Information

Mr. Bahnson does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Bahnson is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Bahnson receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Andrew Subkoviak, Executive Director, Custom Core Portfolio Management, supervises Mr. Bahnson and is responsible for monitoring the advice Mr. Bahnson provides to clients. Mr. Subkoviak can be reached at (206) 353-0486.

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Colton Barnes

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Telephone: (206) 694-5512
Colton.barnes@parametricportfolio.com

Year of Birth: 1996

Educational Background and Business Experience

Educational Background: Western Washington University (B.A., Economics); Nova School of Business and Economics (M.S., Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Associate Portfolio Manager, Parametric (04/23-12/24); Sr. Investment Analyst, Parametric (12/21-04/23); Portfolio Analyst, Parametric (03/21-12/21); Portfolio Administrator, Parametric (02/20-03/21)

Disciplinary Information

Mr. Barnes does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Barnes is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Barnes is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Gigi Liu, Executive Director, supervises Mr. Barnes and is responsible for monitoring the advice Mr. Barnes provides to clients. Ms. Liu can be reached at (206) 381-7032.

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Brian C. Barney

100 Park Avenue, 33rd Floor
New York, NY 10017
Telephone: (212) 205-9003
brian.barney@parametricportfolio.com

Year of Birth: 1979

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: University of Virginia (B.S. Systems Engineering)

Business experience: Managing Director – Institutional Portfolio Management and Trading, Parametric Portfolio Associates LLC (01/20 to Present); Vice President, Director of Institutional Portfolio Strategies and Portfolio Manager, Eaton Vance Management (01/09 to Present).

Disciplinary Information

Mr. Barney does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Barney is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Barney receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jonathan Rocafort, the Head of Fixed Income, supervises Mr. Barney and is responsible for monitoring the advice Mr. Barney provides to clients. Mr. Rocafort can be reached at (212) 205-9000.

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Greg Bauer

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Telephone: (678) 429-8199
gregory.bauer@parametricportfolio.com

Year of Birth: 1975

Educational Background and Business Experience

Designations: CFA, CAIA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: Brown University (B.A. Economics, 1998); Georgia Institute of Technology (M.B.A., 2005)

Business Experience: Executive Director, Parametric Portfolio Associates LLC (09/15 to Present)

Disciplinary Information

Mr. Bauer does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Bauer is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Bauer receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Bauer is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Bauer is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Chris Uhas, Head of Institutional Distribution, supervises Mr. Bauer. He is responsible for monitoring the advice Mr. Bauer provides to clients. Mr. Uhas can be reached at 952 767-7733.

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James Benadum

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New York, NY 10017
Telephone: (212) 296-7015
james.benadum@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: Miami University (B.S.)

Business experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/24 to Present); Vice President, Morgan Stanley Investment Management (2007 to Present)

Disciplinary Information

Mr. Benadum does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Benadum is not actively engaged in any other investment-related-business or occupation.

Additional Compensation

Mr. Benadum receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Kevin Lynyak, Managing Director, is responsible for monitoring the advice Mr. Benadum provides to clients. Mr. Lynyak can be reached at (212) 296-6140.

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Lawrence (Larry) Berman

518 Riverside Avenue
Westport, CT 06880
Telephone: (203) 227-1700
larry.berman@parametricportfolio.com

Year of Birth: 1964

Educational Background and Business Experience

Educational Background: Boston University (B.A. in Marketing, 1987).

Business Experience: Managing Director – Trading, Parametric Portfolio Associates LLC (04/06 to Present).

Disciplinary

Mr. Berman does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Berman is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Berman is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Brian Herscovici, Chief Operating Officer, Investments, supervises Mr. Berman and is responsible for monitoring the advice Mr. Berman provides to clients. Mr. Herscovici can be reached at (206) 405-3041.

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Christian Boshart

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Minneapolis, MN 55435
Telephone: (952) 737-6859
Christian.boshart@parametricportfolio.com

Year of Birth: 1993

Educational Background and Business Experience

Educational Background: University of Iowa (B.B.A, Finance and Marketing); University of Iowa (M.B.A.)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (05/22 to Present); Investment specialist, Carlson Capital Management (09/21-05/22); RFP Writer, Principal Financial Group (12/18-02/21)

Disciplinary Information

Mr. Boshart does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Boshart is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Boshart receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Andrew Subkoviak, Executive Director, Custom Core Portfolio Management, supervises Mr. Boshart and is responsible for monitoring the advice Mr. Boshart provides to clients. Mr. Subkoviak can be reached at (206) 353-0486.

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R.K. Christian Burr

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Rk.burr@parametricportfolio.com

Year of Birth: 1968

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (B.A., Business Administration)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (07/24 to Present); Portfolio Administrator, Parametric (07/19-07/24)

Disciplinary Information

Mr. Burr does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Burr is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Burr receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Michelle Li, Vice President, supervises Mr. Burr and is responsible for monitoring the advice Mr. Burr provides to clients. Ms. Li can be reached at (206) 470-2406.

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William Busch

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William.busch@parametricportfolio.com

Year of Birth: 1979

Educational Background and Business Experience

Educational Background: Bowdoin College (B.A., 2002); Boston College (M.B.A., 2012)

Business Experience: Executive Director, Consultant Relations, Parametric Portfolio Associates LLC (01/22 to Present); Director, Consultant Relations, Parametric (2017 – 01/22)

Disciplinary Information

Mr. Busch does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Busch is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Busch receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Busch is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Mr. Busch is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Jaylene Howard, Head of Client & Consultant Relations supervises Mr. Busch. She is responsible for monitoring the advice Mr. Busch provides to clients. Ms. Howard can be reached at 206 305 8747.

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Drew Carlson

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andrew.carlson1@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Saint John's University (B.A. in Accounting, 2006)

Business Experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/25 to Present); Senior Portfolio Manager, Parametric (01/23 to 12/24); Portfolio Manager, Parametric (3/16 to 01/23)

Disciplinary Information

Mr. Carlson does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Carlson is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Carlson receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Sylvia Horstmann, Director, Investment Strategy, supervises Mr. Carlson and is responsible for monitoring the advice he provides to clients. Ms. Horstmann can be reached at (212) 205 9017.

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Michael Catarina

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Michael.catarina@parametricportfolio.com

Year of Birth: 1995

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Florida State University (B.S. Finance)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Manager, Investment Performance & Competitive Research, Charles Schwab & Co. (05/20-01/23); Performance Analyst, Fidelity Investments (08/18-05/20)

Disciplinary Information

Mr. Catarina does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Catarina is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Catarina is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Galina Warner, Executive Director, Custom Core, supervises Mr. Catarina and is responsible for monitoring the advice Mr. Catarina provides to clients. Ms. Warner can be reached at (206) 233-2242.

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Jesse Cauble

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Seattle, WA 98104
Telephone: (206) 694-5506
jesse.cauble@parametricportfolio.com

Year of Birth: 1993

Educational Background and Business Experience

Educational Background: Chapman University (B.S. Business Administration, Finance)

Business Experience: Director, Institutional Relationships (06/22 to Present)

Disciplinary Information

Mr. Cauble does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Cauble is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Cauble receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Cauble is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Cauble is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Chris Uhas, Head of Institutional Distribution, supervises Mr. Cauble. He is responsible for monitoring the advice Mr. Cauble provides to clients. Mr. Uhas can be reached at 952 767 7733.

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Jason Chalmers

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jason.chalmers@parametricportfolio.com

Year of Birth: 1974

Educational Background and Business Experience

Educational Background: Northeastern University (B.S. Economics, 1997); Boston College (M.S. Finance, 2007)

Business Experience: Executive Director, Parametric Portfolio Associates LLC (04/14 to Present)

Disciplinary Information

Mr. Chalmers does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Chalmers is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Chalmers receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Chalmers is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Chalmers is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Jaylene Howard, Head of Client & Consultant Relations supervises Mr. Chalmers. She is responsible for monitoring the advice Mr. Chalmers provides to clients. Ms. Howard can be reached at 206 305 8747.

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Lang Chang

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Year of Birth:1984

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Purdue University (B.S., Management); University of Chicago, Booth School of Business (M.B.A)

Business Experience: Senior Portfolio Manager, Parametric Portfolio Associates LLC (04/18 to Present)

Disciplinary Information

Mr. Chang does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Chang is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Chang receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

James Reber, Managing Director, Institutional CPM, supervises Mr. Chang and is responsible for monitoring the advice Mr. Chang provides to clients. Mr. Reber can be reached at (206) 694-4145.

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Seona Chang

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Seona.chang@parametricportfolio.com

Year of Birth: 1973

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Ewha Womans University, South Korea (B.A., Sociology); Korea University (M.B.A)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (10/19 to Present)

Disciplinary Information

Ms. Chang does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Chang is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Chang receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Gigi Liu, Executive Director, supervises Ms. Chang and is responsible for monitoring the advice Ms. Chang provides to clients. Ms. Liu can be reached at (206) 381-7032.

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Simba Change
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Telephone: (770) 871-7014
Simba.change@parametricportfolio.com

Year of Birth: 1991

Educational Background and Business Experience
Educational Background: Pacific Lutheran University (B.S., Business Finance); University of Washington (M.B.A.)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (01/22 to Present); Portfolio Manager, Parametric (2019-2021)

Disciplinary Information
Mr. Change does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Change is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Change is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision
Gigi Liu, Executive Director, supervises Mr. Change and is responsible for monitoring the advice Mr. Change provides to clients. Ms. Liu can be reached at (206) 381-7032.

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Adriana Chaturvedi

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Telephone: (206) 405-3014
Adriana.chaturvedi@parametricportfolio.com

Year of Birth:1988

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Northwood University (B.B.A., Banking and Finance)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Portfolio Manager, Parametric (01/21-12/24); Associate Portfolio Manager, Parametric (03/18-12/20)

Disciplinary Information

Ms. Chaturvedi does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Chaturvedi is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Chaturvedi receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Sam Swartz, Executive Director, supervises Ms. Chaturvedi and is responsible for monitoring the advice Ms. Chaturvedi provides to clients. Mr. Swartz can be reached at (206) 381-6128.

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Max Chisaka

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max.chisaka@parametricportfolio.com

Year of Birth: 1984

Educational Background and Business Experience

Educational Background: Creighton University (MSc. Investment Management and Financial Analysis, 2014); Southwest Minnesota State University (MBA, 2011 and BSc. Finance, 2009)

Business Experience: Associate Portfolio Manager, Parametric (10/21 to Present); Senior Investment Analyst, Parametric (10/18-9/21)

Disciplinary Information

Mr. Chisaka does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Chisaka is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Chisaka receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Dan Wamre, Director, Investment Strategy, supervises Mr. Chisaka and is responsible for monitoring the advice he provides to clients. Mr. Wamre can be reached at (952) 767 7710.

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Jacob Christina

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Year of Birth: 1995

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota (B.S. in Finance, 2017)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Associate Portfolio Manager, Parametric (10/22-12/24); Investment Analyst, 3M Company (9/17-10/22)

Disciplinary Information

Mr. Christina does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Christina is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Christina receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Heather Wolf, Portfolio Manager, supervises Mr. Christina and is responsible for monitoring the advice he provides to clients. Ms. Wolf can be reached at (952) 767 7759.

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Nia Clark

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nia.clark@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: Stony Brook University (B.S. Business Management)

Business experience: Investment Management Analyst, Parametric Portfolio Associates LLC, (2021 to Present)*

Disciplinary Information

Ms. Clark does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Clark is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Clark receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Devin Cooch, Director, supervises Ms. Clark and is responsible for monitoring the advice Ms. Clark provides to clients. Mr. Cooch can be reached at (212) 205-9010.

*Ms. Clark was an undergraduate student prior to 2021 and does not have relevant business experience to disclose prior to her graduation.

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Shane Claugherty

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shane.claugherty@parametricportfolio.com

Year of Birth: 1995

Educational Background and Business Experience

Educational Background: Minnesota State University, Mankato (B.S. Finance)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (12/21 to Present); Senior Investment Analyst, Parametric (03/19 – 12/21)

Disciplinary Information

Mr. Claugherty does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Claugherty is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Claugherty is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Macki Anderson, Portfolio Manager, supervises Mr. Claugherty and is responsible for monitoring the advice Mr. Claugherty provides to clients. Mr. Anderson can be reached at (952) 767-7864.

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Dan Codreanu

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Year of Birth: 1980

Educational Background and Business Experience

Designations: CFA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: West University - Timisoara, Romania (BA); Suffolk University (MS)

Business Experience: Director – Portfolio Management and Quantitative Research, Parametric Portfolio Associates LLC (01/20 to Present) Vice President of Eaton Vance Management, Sr. Quantitative Analyst (12/12 to 12/19)

Disciplinary Information

Mr. Codreanu does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Codreanu is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Codreanu receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Issac Kuo, Managing Director, Portfolio Management and Head of Quantitative Research, supervises Mr. Codreanu and is responsible for monitoring the advice Mr. Codreanu provides to clients. Mr. Kuo can be reached at (205) 205-9000.

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Devin Cooch

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devin.cooch@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: Bucknell University (B.A. Economics)

Business experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/20 to Present); Vice President, Portfolio Manager and Trader, Eaton Vance Management (01/09-2020)

Disciplinary Information

Mr. Cooch does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Cooch is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Cooch receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Brian Barney, Managing Director – Institutional Portfolio Management and Trading, supervises Mr. Cooch and is responsible for monitoring the advice Mr. Cooch provides to clients. Mr. Barney can be reached at (212) 205-9003.

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Daniel Cozzi

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Year of Birth: 1981

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: University of Delaware (B.A. Criminal Justice)

Business experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/20 to Present); Assistant Vice President and Portfolio Manager, Eaton Vance Management (2014-2020)

Disciplinary Information

Mr. Cozzi does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Cozzi is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Cozzi receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Brian Barney, Managing Director – Institutional Portfolio Management and Trading, supervises Mr. Cozzi and is responsible for monitoring the advice Mr. Cozzi provides to clients. Mr. Barney can be reached at (212) 205-9003.

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Year of Birth: 1994

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Bentley University (B.A., 2016)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Current); Associate Portfolio Manager, Parametric (01/23 – 12/24); Quantitative Analyst, Interactive Advisors (01/21-01/23)

Disciplinary Information

Mr. Crowther does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Crowther is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Crowther is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Hang Ngyuen, Executive Director, CPM, supervises Mr. Crowther and is responsible for monitoring the advice Mr. Crowther provides to clients. Ms. Nguyen can be reached at (206) 381-6428.

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Joseph Davolio
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Telephone: (212) 205-9005
joseph.davolio@parametricportfolio.com

Year of Birth: 1979

Educational Background and Business Experience
Educational Background: Walsh University (B.A. Finance)

Business experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/20 to Present); Vice President and Portfolio Manager, Eaton Vance Management (2009-2020)

Disciplinary Information
Mr. Davolio does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Davolio is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Davolio receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Brian Barney, Managing Director – Institutional Portfolio Management and Trading, supervises Mr. Davolio and is responsible for monitoring the advice Mr. Davolio provides to clients. Mr. Barney can be reached at (212) 205-9003.

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Cristian Diaz

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Cristian.diaz@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: University of Washington (B.A., Economics)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (06/24 to Present); Investment Analyst, Parametric (02/22-06/24); Activity Management Associate, Parametric (07/20-02/22)

Disciplinary Information

Mr. Diaz does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Diaz is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Diaz is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Kevin Tjernberg, Executive Director, supervises Mr. Diaz and is responsible for monitoring the advice Mr. Diaz provides to clients. Mr. Tjernberg can be reached at (206) 381-6419.

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David Dickey
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Year of Birth: 1988

Educational Background and Business Experience
Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Oklahoma State University (B.A., Business Administration, Economics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates, LLC (01/22 to Present); Portfolio Manager, Parametric (04/20-01/22); Investment Associate, Value Partners Investments (1/18-04/20)

Disciplinary Information
Mr. Dickey does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Dickey is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Dickey receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Adriana Chaturvedi, Sr. Portfolio Manager, supervises Mr. Dickey and is responsible for monitoring the advice Mr. Dickey provides to clients. Ms. Chaturvedi can be reached at (206) 405-3014.

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John Dillon

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john.dillon2@parametricportfolio.com

Year of Birth: 1965

Educational Background and Business Experience

Educational Background: St. John's University (B.S.)

Business experience: Managing Director, Portfolio Management, Parametric Portfolio Associates LLC (05/23 to Present); Managing Director, Morgan Stanley Investment Management (1987 to 2023)

Disciplinary Information

Mr. Dillon does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Dillon is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Dillon receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Nisha Patel, Managing Director, is responsible for monitoring the advice Mr. Dillon provides to clients. Ms. Patel can be reached at (212) 205–9007.

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Liyuan Du

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Liyuan.du@parametricportfolio.com

Year of Birth: 1984

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Illinois Institute of Technology (M.S., Finance); Tsinghua University (Master of Software Engineering)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (03/18 to Present)

Disciplinary Information

Ms. Du does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Du is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Du receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Xiaozhen Li, Executive Director, supervises Ms. Du and is responsible for monitoring the advice Ms. Du provides to clients. Ms. Li can be reached at (206) 694-5537.

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Christian Eichele

518 Riverside Avenue
Westport, CT 06880
Telephone: (203) 227-1700
christian.eichele@parametricportfolio.com

Year of Birth: 1977

Educational Background and Business Experience

Educational Background: Lake Forest College (B.A. Economics)

Business Experience: Trader, Parametric Portfolio Associates LLC (03/21 to Present); Senior Trader, Wolverine Trading LLC (10/00 – 03/21)

Disciplinary Information

Mr. Eichele does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Eichele is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Eichele receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Lawrence Berman, Managing Director – Trading supervises Mr. Eichele and is responsible for monitoring the advice Mr. Eichele provides to clients. Mr. Berman can be reached at (203) 227-1700.

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Ken Everding

518 Riverside Avenue
Westport, CT 06880
Telephone: (206) 227-1700
ken.everding@parametricportfolio.com

Year of Birth: 1962

Educational Background and Business Experience

Educational Background: Iowa State University (B.S. in Physics, 1985); Yale University (Ph.D. in Physics, 1990).

Business Experience: Managing Director – Research, Parametric Portfolio Associates LLC (01/07 to Present)

Disciplinary Information

Mr. Everding does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Everding is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Everding is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Benjamin Hood, Managing Director - Research, supervises Mr. Everding and is responsible for monitoring the advice Mr. Everding provides to clients. Mr. Hood can be reached at (952) 727 6891.

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Dane Fickel

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Minneapolis, MN 55435
Telephone: (952) 767 7704
dane.fickel@parametricportfolio.com

Year of Birth: 1986

Educational Background and Business Experience

Designations: CAIA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (B.A. in Economics, 2009)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (7/15 to Present)

Disciplinary Information

Mr. Fickel does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Fickel is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Fickel receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Clint Talmo, Managing Director, Investment Strategy, supervises Mr. Fickel and is responsible for monitoring the advice he provides to clients. Mr. Talmo can be reached at (952) 737 6816.

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Benjamin Finley
800 Fifth Avenue, Suite 2800
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Telephone: (206) 381-2728
Benjamin.finley@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience
Designations: CFA, CIPM (Please see Summary of Professional Designations on Appendix A.)

Educational Background: University of Oregon (B.S., Business Administration)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (12/18 to Present)

Disciplinary Information
Mr. Finley does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Finley is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Finley receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Sam Hodge, Senior Portfolio Manager, supervises Mr. Finley and is responsible for monitoring the advice Mr. Finley provides to clients. Mr. Hodge can be reached at (206) 405-3006.

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Michael Finney

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Seattle, Washington 98104
Telephone: (206) 381-6129
Michael.finney@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (BA – Economics), La Trobe University (Master of Financial Analysis)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (11/18 - Present)

Disciplinary Information

Mr. Finney does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Finney is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Finney receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Michelle Li, Vice President, supervises Mr. Finney and is responsible for monitoring the advice Mr. Finney provides to clients. Ms. Li can be reached at (206) 470-2406.

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Richard Fong

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Telephone: (952) 767 7721
Richard.fong@parametricportfolio.com

Year of Birth: 1987

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Gustavus Adolphus College (B.A. in Economics, 2009)

Business Experience: Managing Director, Investment Strategy, Parametric Portfolio Associates LLC (2020 to Present)

Disciplinary Information

Mr. Fong does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Fong is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Fong receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Thomas Lee, Chief Investment Officer, supervises Mr. Fong and is responsible for monitoring the advice he provides to clients. Mr. Lee can be reached at (952) 767 7730.

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Rodolfo Galgana

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Seattle, Washington 98104
Telephone: (206) 381-7018
Rodolfo.galgana@parametricportfolio.com

Year of Birth: 1980

Educational Background and Business Experience

Educational Background: University of Washington (BS – Electrical Engineering), Seattle University (MBA)

Business Experience: Director, Centralized Portfolio Management, Parametric Portfolio Associates LLC (01/21 to Present); Portfolio Manager, Parametric (2014- 2021)

Disciplinary Information

Mr. Galgana does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Galgana is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Galgana receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jennifer Mihara, Managing Director, Head of Equity Fund Management, supervises Mr. Galgana and is responsible for monitoring the advice Mr. Galgana provides to clients. Ms. Mihara can be reached at (206) 694-5514.

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Rainer Germann

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Rainer.germann@parametricportfolio.com

Year of Birth: 1971

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Manitoba (B.S. – Actuarial Sciences)

Business Experience: Director, Global Portfolio Management, Parametric Portfolio Associates LLC (10/05 to Present)

Disciplinary Information

Mr. Germann does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Germann is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Germann receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Geoff Longmeier, Managing Director, Global Equities, supervises Mr. Germann and is responsible for monitoring the advice Mr. Germann provides to clients. Mr. Longmeier can be reached at (206) 694-2720.

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Peggy Glanzman

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New York, NY 10017
Telephone: (212) 296-7030
peggy.glanzman@parametricportfolio.com

Year of Birth: 1967

Educational Background and Business Experience

Educational Background: College of Mount Saint Vincent (B.A.)

Business experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (05/23 to Present); Executive Director, Morgan Stanley Investment Management (2000 to 2023)

Disciplinary Information

Ms. Glanzman does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Glanzman is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Glanzman receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients..

Supervision

Nisha Patel, Managing Director, is responsible for monitoring the advice Ms. Glanzman provides to clients. Ms. Patel can be reached at (212) 205-9007.

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Whitney Gosnell

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Seattle, Washington 98104
Telephone: (206) 405-3004
Whitney.gosnell@parametricportfolio.com

Year of Birth: 1987

Educational Background and Business Experience

Educational Background: Connecticut College (B.A. Economics)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (01/22 to Present); Supervisor, Institutional Reconciliation Team, Parametric (11/17-12/21)

Disciplinary Information

Mr. Gosnell does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Gosnell is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Gosnell is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Sam Hodge, Senior Portfolio Manager, supervises Mr. Gosnell and is responsible for monitoring the advice Mr. Gosnell provides to clients. Mr. Hodge can be reached at (206) 405-3006.

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Thomas Hardy

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Seattle, Washington 98104
Telephone: (206) 381-6118
Thomas.hardy1@parametricportfolio.com

Year of Birth: 1969

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (B.A. Business Administration)

Business Experience: Director, Global Portfolio Management, Parametric Portfolio Associates LLC (2008 to Present)

Disciplinary Information

Mr. Hardy does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Hardy is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Hardy receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Geoff Longmeier, Managing Director, Global Equities, supervises Mr. Hardy and is responsible for monitoring the advice Mr. Hardy provides to clients. Mr. Longmeier can be reached at (206) 694-2720.

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Arthur Harris

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Telephone: (952) 737 6838
Arthur.harris@parametricportfolio.com

Year of Birth: 1994

Educational Background and Business Experience

Educational Background: Iowa State University (B.S. in Finance & Business Economics, 2016)

Business Experience: Portfolio Manager, Parametric Portfolio Associates (01/23 to Present); Associate Portfolio Manager, Parametric (07/19 to 01/23)

Disciplinary Information

Mr. Harris does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Harris is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Harris receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Brendan Lanahan, Director, Trading, supervises Mr. Harris and is responsible for monitoring the advice he provides to clients. Mr. Lanahan can be reached at 203 227 1700.

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Chris Haskamp

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Telephone: (952) 767 7708
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Year of Birth: 1978

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota (B.S. in Biochemistry, 2000); University of California, San Diego (M.S. Chemistry, 2002); University of Minnesota (M.B.A., 2007)

Business Experience: Director of Investment Strategy, Parametric (2006 to Present)

Disciplinary Information

Mr. Haskamp does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Haskamp is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Haskamp receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Richard Fong, Managing Director, Investment Strategy, supervises Mr. Haskamp and is responsible for monitoring the advice he provides to clients. Mr. Fong can be reached at (952) 767 7721.

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Noah Heitshusen

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Minneapolis, MN 55435
Telephone: (952) 767-6870
Noah.heitshusen@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: University of Iowa (B.B.A. in Finance, 2019)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Senior Investment Analyst, Parametric (01/22-01/25); Investment Analyst, Parametric (06/19-01/22)

Disciplinary Information

Mr. Heitshusen does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Heitshusen is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Heitshusen receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Macki Anderson, Senior Portfolio Manager, supervises Mr. Heitshusen and is responsible for monitoring the advice he provides to clients. Mr. Anderson can be reached at 952 767 7864.

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John Hemingway

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john.hemingway@parametricportfolio.com

Year of Birth: 1992

Educational Background and Business Experience

Designations: CFA, CPA (See Appendix for Summary of Professional Designations.)

Educational Background: Loyola University, Maryland (B.A. Political Science)

Business experience: Vice President, Portfolio Manager, Parametric Portfolio Associates LLC (09/19 to Present)

Disciplinary Information

Mr. Hemingway does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Hemingway is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Hemingway receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Nisha Patel, Managing Director, is responsible for monitoring the advice Mr. Hemingway provides to clients. Ms. Patel can be reached at (212) 205-9007.

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James Henderson

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Telephone: (206) 381-6443
James.henderson@parametricportfolio.com

Year of Birth: 1990

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (B.A. Economics)

Business Experience: Senior Portfolio Manager, Parametric Portfolio Associates LLC (01/22 to Present); Portfolio Manager, Parametric (11/18 – 12/21)

Disciplinary Information

Mr. Henderson does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Henderson is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Henderson receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Xiaozhen Li, Executive Director, Portfolio Management, supervises Mr. Henderson and is responsible for monitoring the advice Mr. Henderson provides to clients. Ms. Li can be reached at (206) 694-5537.

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Stuart Hesdorffer

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Telephone: (952) 767-7724
Stuart.hesdorffer@parametricportfolio.com

Year of Birth: 1996

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Clemson University (B.S., Economics); Clemson University (M.A., Economics)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (1/25 to Present); Sr. Investment Analyst, Parametric (01/24-12/24); Investment Analyst, Parametric (09/21-12/23); M&A Analyst, Sunbelt Business Advisors (03/20-09/21)

Disciplinary Information

Mr. Hesdorffer does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Hesdorffer is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Hesdorffer receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Drew Carlson, Sr. Portfolio Manager, supervises Mr. Hesdorffer and is responsible for monitoring the advice Mr. Hesdorffer provides to clients. Mr. Carlson can be reached at (952) 737-6836.

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Evan Hewitt

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Year of Birth: 1990

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Macalester College (B.A. Economics, 2012)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (3/19 to Present)

Disciplinary Information

Mr. Hewitt does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Hewitt is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Hewitt receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Drew Carlson, Sr. Portfolio Manager supervises Mr. Hewitt and is responsible for monitoring the advice he provides to clients. Mr. Carlson can be reached at (952) 737-6836.

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Shaun Hockeiser

800 Fifth Avenue, Suite 2800
Seattle, Washington 98104
Telephone: (206) 405-3017
Shaun.hockeiser@parametricportfolio.com

Year of Birth: 1990

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: New York University (B.A., Economics); Georgia Institute of Technology (M.S., Analytics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (03/19 to Present)

Disciplinary Information

Mr. Hockeiser does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Hockeiser is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Hockeiser is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Sam Hodge, Senior Portfolio Manager, supervises Mr. Hockeiser and is responsible for monitoring the advice Mr. Hockeiser provides to clients. Mr. Hodge can be reached at (206) 405-3006.

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Samuel Hodge

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Telephone: (206) 405-3006
Samuel.hodge@parametricportfolio.com

Year of Birth:1991

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Pacific Lutheran University (B.A. Business Administration); University of Washington (M.B.A.)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Portfolio Manager, Parametric (11/20-12/24); Associate Portfolio Manager, Parametric (01/19-10/20)

Disciplinary Information

Mr. Hodge does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Hodge is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Hodge receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Sam Swartz, Executive Director, supervises Mr. Hodge and is responsible for monitoring the advice Mr. Hodge provides to clients. Mr. Swartz can be reached at (206) 381-6128.

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Sylvia Horstmann

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Telephone: (212) 205-9017
sylvia.horstmann@parametricportfolio.com

Year of Birth: 1980

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Puget Sound (B.A. in Business, 2002; B.A. in Economics, 2002);

Business Experience: Director of Investment Strategy, Parametric Portfolio Associates LLC (2023 to Present), Senior Portfolio Manager, Parametric (2022-2023), Senior Portfolio Manager, Russell Investments (2020-2022)

Disciplinary Information

Mrs. Horstmann does not have any legal or disciplinary events to disclose.

Other Business Activities

Mrs. Horstmann is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mrs. Horstmann receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Richard Fong, Director, Investment Strategy, supervises Mrs. Horstmann and is responsible for monitoring the advice she provides to clients. Mr. Fong can be reached at (952) 767 7721.

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Jaylene Howard
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Telephone: (206) 305 8747
Jaylene.howard@parametricportfolio.com

Year of Birth: 1980

Educational Background and Business Experience
Designations: CFA, CAIA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: Gonzaga University (B.A., Economics, History)

Business Experience: Managing Director, Head of Client and Consultant Relations, Parametric Portfolio Associates LLC (12/22 to Present); Executive Director, Parametric (06/18 – 11/22)

Disciplinary Information
Ms. Howard does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. Howard is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Ms. Howard receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Ms. Howard is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Ms. Howard is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision
Chris Uhas, Head of Institutional Distribution, supervises Ms. Howard. He is responsible for monitoring the advice Ms. Howard provides to clients. Mr. Uhas can be reached at (952) 767 7733.

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Cooper Hutchins
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Boston, MA 02110
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Cooper.hutchins@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience
Educational Background: University of Washington (B.S., Finance)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (09/24 to Present); Sr. Investment Analyst, Parametric (01/23-09/24); Investment Analyst, Parametric (11/21-12/22)*

Disciplinary Information
Mr. Hutchins does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Hutchins is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Hutchins is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision
Simba Change, Senior Portfolio Manager, supervises Mr. Hutchins and is responsible for monitoring the advice Mr. Hutchins provides to clients. Mr. Change can be reached at (770) 871-7014.

*Mr. Hutchins was an undergraduate student and does not have relevant business experience to report prior to his graduation in 2021.

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Lauren A. Kashmanian
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Boston, MA 02109
Telephone: (617) 672-7374
lauren.kashmanian@parametricportfolio.com

Year of Birth: 1985

Educational Background and Business Experience
Educational Background: University of Miami, (B.A. International Finance and Marketing); Fordham University (M.B.A.)

Business experience: Director, Portfolio Management and Responsible Investing, Parametric Portfolio Associates LLC (01/22 to Present); Sr. Portfolio Manager, Parametric (01/20 – 01/22); Vice President, SMA Trader and Portfolio Manager, Eaton Vance Management (2008-2020)

Disciplinary Information
Ms. Kashmanian does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. Kashmanian is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Ms. Kashmanian receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Nisha Patel, Managing Director, SMA Portfolio Management, supervises Ms. Kashmanian and is responsible for monitoring the advice Ms. Kashmanian provides to clients. Ms. Patel can be reached at (212) 205-9007.

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Hunter Kelly

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Minneapolis, MN 55435
Telephone: (952) 767 7862
hunter.kelly@parametricportfolio.com

Year of Birth: 1997

Educational Background and Business Experience

Educational Background: The Ohio State University (B.S.B.A., 2018)

Business Experience: Associate Portfolio Manager, Parametric (1/2022 to Present); Senior Investment Analyst, Parametric (1/21-12/22); Investment Analyst, Parametric (7/19-12/21)

Disciplinary Information

Mr. Kelly does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Kelly is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Kelly receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Zach Olsen, Senior Portfolio Manager, supervises Mr. Kelly and is responsible for monitoring the advice he provides to clients. Mr. Olsen can be reached at (952) 737 6850.

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Michael Kelly
518 Riverside Avenue
Westport, CT 06880
Telephone: (203) 227-1700
Michael.kelly@parametricportfolio.com

Year of Birth: 1971

Educational Background and Business Experience
Educational Background: Providence College (B.A. History, 1993).

Business Experience: Managing Director – Trading, Parametric Portfolio Associates LLC (03/08 to Present)

Disciplinary Information
Mr. Kelly does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Kelly is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Kelly receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Lawrence Berman, Managing Director – Trading supervises Mr. Kelly and is responsible for monitoring the advice Mr. Kelly provides to clients. Mr. Berman can be reached at (203) 227-1700.

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Omar Khosht

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omar.khosht@parametricportfolio.com

Year of Birth: 1994

Educational Background and Business Experience

Educational Background: Misr International University (B.B.A Finance); University of New Haven (M.S. Finance)

Business Experience: Trader, Parametric Portfolio Associates LLC (2024 to Present); Senior Investment Analyst, Parametric (2022-2023); Investment Analyst, Parametric (2020-2021)

Disciplinary Information

Mr. Khosht does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Khosht is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Khosht is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Lawrence Berman, Managing Director – Trading supervises Mr. Khosht and is responsible for monitoring the advice Mr. Khosht provides to clients. Mr. Berman can be reached at (203) 227-1700.

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Mariia Kot

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Seattle, Washington 98104
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Mariia.kot@parametricportfolio.com

Year of Birth: 1995

Educational Background and Business Experience

Educational Background: Igor Sikorsky Kyiv Polytechnic Institute (B.S. in Mathematics and Physics); Saint Xavier University (M.S. Business Analysis)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (06/21 to Present); Portfolio Manager, AON (08/18-06/21)

Disciplinary Information

Ms. Kot does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Kot is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Kot is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Galina Warner, Executive Director, Custom Core, supervises Ms. Kot and is responsible for monitoring the advice Ms. Kot provides to clients. Ms. Warner can be reached at (206) 233-2242.

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Issac Kuo

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isaac.kuo@parametricportfolio.com

Year of Birth: 1980

Educational Background and Business Experience

Designations: CFA, CPA (See Appendix for Summary of Professional Designations.)

Educational Background: University of North Carolina (B.S. Mathematical Sciences); UNC Kenan-Flagler Business School (Master of Accounting)

Business experience: Managing Director – Portfolio Management and Head of Quantitative Research, Parametric Portfolio Associates LLC (01/20 to Present); Vice President and Co-Director of SMA Strategies, Eaton Vance (03/10 to 01/20)

Disciplinary Information

Mr. Kuo does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Kuo is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Kuo receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jonathan Rocafort, Head of Fixed Income, supervises Mr. Kuo and is responsible for monitoring the advice Mr. Kuo provides to clients. Mr. Rocafort can be reached at (212) 205-9000.

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Brendan Lanahan

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Westport, CT 06880
Telephone: (203) 227-1700
Brendan.lanahan@parametricportfolio.com

Year of Birth: 1978

Educational Background and Business Experience

Educational Background: Elmira College (B.S. Business Management and Marketing)

Business Experience: Director, Trading, Parametric Portfolio Associates LLC (10/12 to Present)

Disciplinary Information

Mr. Lanahan does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Lanahan is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Lanahan is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Lawrence Berman, Managing Director – Trading supervises Mr. Lanahan and is responsible for monitoring the advice Mr. Lanahan provides to clients. Mr. Berman can be reached at (203) 227-1700.

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Don Lee

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Telephone: (206) 757-1624
Don.lee@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Educational Background: Harvey Mudd College (B.S., Engineering); Claremont Graduate University (M.S., Financial Engineering)

Business Experience: Portfolio Manager Parametric Portfolio Associates LLC (01/21 to Present); Portfolio Associate (03/20-01/21)

Disciplinary Information

Mr. Lee does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Lee is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Lee receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Andrew Subkoviak, Executive Director, Custom Core Portfolio Management, supervises Mr. Lee and is responsible for monitoring the advice Mr. Lee provides to clients. Mr. Subkoviak can be reached at (206) 353-0486.

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Thomas Lee

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Minneapolis, MN 55435
Telephone: (952) 767 7730
Thomas.lee@parametricportfolio.com

Year of Birth: 1967

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota (B.S. in Economics); University of Minnesota (M.B.A. in Finance)

Business Experience: Co-President, Parametric Portfolio Associates LLC (01/23 to Present); Chief Investment Officer, Parametric (11/19 to Present)

Disciplinary Information

Mr. Lee does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Lee is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Lee receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Ben Huneke, the Head of Investment Management of Morgan Stanley Investment Management, supervises Mr. Lee. Mr. Huneke can be reached at (212) 296-1595.

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Michelle Li

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Seattle, Washington 98104
Telephone: (206) 470-2406
Michelle.li@parametricportfolio.com

Year of Birth: 1992

Educational Background and Business Experience

Educational Background: University of Michigan Ann Arbor (B. S. in Financial Math, B.S. in Economics); University of California Los Angeles (M.S. Financial Engineering)

Business Experience: Portfolio Manager, Centralized Portfolio Management, Parametric Portfolio Associates LLC (01/22 – Present); Associate Portfolio Manager, Parametric (05/20 – 01/22)

Disciplinary Information

Ms. Li does not have any disciplinary events to disclose.

Other Business Activities

Ms. Li is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Li receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Rodolfo Galgana, Executive Director, supervises Ms. Li and is responsible for monitoring the advice Ms. Li provides to clients. Mr. Galgana can be reached at (206) 381-7018.

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Perry Li
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Year of Birth: 1988

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Sun Yat-Sen University (B.S. Science and Statistics, 2010); University of Minnesota (Masters – Financial Mathematics, 2012)

Business Experience: Senior Investment Strategist, Parametric Portfolio Associates LLC (2020 to Present)

Disciplinary Information

Mr. Li does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Li is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Li receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Alex Zweber, Managing Director, Investment Strategy, supervises Mr. Li and is responsible for monitoring the advice he provides to clients. Mr. Zweber can be reached at (952) 208-8319.

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Xiaozhen Li
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Xiaozhen.li@parametricportfolio.com

Year of Birth: 1967

Educational Background and Business Experience
Educational Background: University of Science and Technology of China (B.S. Physics); University of Washington (M.S. Physics); University of Washington (PhD. Economics)

Business Experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (06/00 to Present)

Disciplinary Information
Ms. Li does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. Li is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Ms. Li receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
James Reber, Managing Director, Institutional CPM, supervises Ms. Li and is responsible for monitoring the advice Ms. Li provides to clients. Mr. Reber can be reached at (206) 694-4145.

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Qiwen (Gigi) Liu

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Telephone: (206) 381-7032
Gigi.liu@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Tsinghua University (B.S. Computer Science); Fudan University (M.S. Financial Engineering); University of Washington (M.B.A.)

Business Experience: Director, Custom Core Portfolio Management, Parametric Portfolio Associates LLC (03/20 to Present); Associate Portfolio Manager, Parametric (01/14 to 03/20)

Disciplinary Information

Ms. Liu does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Liu is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Liu receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Gordon Wotherspoon, Managing Director, Equity SMA supervises Ms. Liu and is responsible for monitoring the advice Ms. Liu provides to clients. Mr. Wotherspoon can be reached at (206) 694-5519.

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Geoff Longmeier

800 Fifth Avenue, Suite 2800
Seattle, Washington 98104
Telephone: (206) 694-2720
Geoff.longmeier@parametricportfolio.com

Year of Birth: 1971

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Western Washington University (B.A. in Business Management)

Business Experience: Managing Director, Global Equities, Parametric Portfolio Associates LLC (01/20 to Present) Managing Director of Centralized Portfolio Management, Parametric (11/16 to 12/19)

Disciplinary Information

Mr. Longmeier does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Longmeier is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Longmeier receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jennifer Mihara, Managing Director, Head of Equity Fund Management, supervises Mr. Longmeier and is responsible for monitoring the advice Mr. Longmeier provides to clients. Ms. Mihara can be reached at (206) 694-5514.

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Egan Ludwig

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Telephone: (206) 342-7908
Egan.ludwig@parametricportfolio.com

Year of Birth: 1977

Educational Background and Business Experience

Educational Background: Western Washington University (B.A. Accounting; B.A. Management Information Systems)

Business Experience: Director, Custom Core Portfolio Management, Parametric Portfolio Associates LLC (07/11 to Present)

Disciplinary Information

Mr. Ludwig does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Ludwig is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Ludwig receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Andrew Subkoviak, Executive Director, Custom Core Portfolio Management, supervises Mr. Ludwig and is responsible for monitoring the advice Mr. Ludwig provides to clients. Mr. Subkoviak can be reached at (206) 353-0486.

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Wesley Ludwig

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Seattle, Washington 98104
Telephone: (206) 757-1523
Wesley.ludwig@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: Washington State University (B.A. Finance; B.A. Accounting)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (08/24 to Present); Investment Analyst, Parametric (02/22-08/24)*

Disciplinary Information

Mr. Ludwig does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Ludwig is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Ludwig is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Galina Warner, Executive Director, Custom Core, supervises Mr. Ludwig and is responsible for monitoring the advice Mr. Ludwig provides to clients. Ms. Warner can be reached at (206) 233-2242.

*Mr. Ludwig was an undergraduate student prior to 2022 and does not have relevant business experience prior to his graduation in 2021.

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Max Lutz

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Seattle, Washington 98104
Telephone: (206) 718-4932
Max.lutz@parametricportfolio.com

Year of Birth:1991

Educational Background and Business Experience

Educational Background: University of Washington (B.S., Mathematics, Physics, Astronomy); University of Washington (M.S., Computational Finance and Risk Management)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Portfolio Manager, Parametric (12/19-12/24)

Disciplinary Information

Mr. Lutz does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Lutz is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Lutz receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

James Reber, Managing Director, Institutional CPM, supervises Mr. Lutz and is responsible for monitoring the advice Mr. Lutz provides to clients. Mr. Reber can be reached at (206) 694-4145.

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Kevin Lynyak
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New York, NY 10017
Telephone: (212) 296-6140
kevin.lynyak@parametricportfolio.com

Year of Birth: 1973

Educational Background and Business Experience
Educational Background: University of Notre Dame (B.A.)

Business experience: Managing Director, Portfolio Management, Parametric Portfolio Associates LLC (05/23 to Present); Managing Director, Morgan Stanley Investment Management (1987 to 04/23)

Disciplinary Information
Mr. Lynyak does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Lynyak is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Lynyak receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Jonathan Rocafort, Head of Fixed Income, supervises Mr. Lynyak and is responsible for monitoring the advice Mr. Lynyak provides to clients. Mr. Rocafort can be reached at (212) 205-9000.

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Aidan McCabe
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aidan.mccabe@parametricportfolio.com

Year of Birth: 1996

Educational Background and Business Experience
Educational Background: Fordham University (B.A.)

Business experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC, (2023 to Present); Senior Associate, Morgan Stanley Investment Management (2021 to 2023); Associate, Morgan Stanley Investment Management (2020 to 2022); Analyst, Morgan Stanley Wealth Management (2018 to 2020).

Disciplinary Information
Mr. McCabe does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. McCabe is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Mr. McCabe receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Devin Cooch, Executive Director, supervises Mr. McCabe and is responsible for monitoring the advice Mr. McCabe provides to clients. Mr. Cooch can be reached at (212) 205-9010.

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Jacob McCord

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Jacob.mccord@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: University of Washington (B.S., Business Administration and Management)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (02/25 to Present); Investment Analyst, Parametric (09/22-01/25); Operations Associate, Parametric (04/21-09/22); Contract Billing Associate, Trident Seafoods (2020-2021)

Disciplinary Information

Mr. McCord does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. McCord is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. McCord is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Kevin Tjernberg, Executive Director, supervises Mr. McCord and is responsible for monitoring the advice Mr. McCord provides to clients. Mr. Tjernberg can be reached at (206) 381-6419.

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Maeve McGonigal
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maeve.mcgonigal@parametricportfolio.com

Year of Birth: 1997

Educational Background and Business Experience
Educational Background: University of Iowa (B.B.A. in Finance, 2019)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Senior Investment Analyst, Parametric (01/22-01/23); Investment Analyst, Parametric (08/19-01/22)

Disciplinary Information
Ms. McGonigal does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. McGonigal is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Ms. McGonigal receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Jason Nelson, Senior Portfolio Manager, supervises Ms. McGonigal and is responsible for monitoring the advice he provides to clients. Mr. Nelson can be reached at (952) 767 7871.

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Scott McLaren

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Seattle, Washington 98104
Telephone: (206) 381-7022
Scott.mclaren@parametricportfolio.com

Year of Birth: 1994

Educational Background and Business Experience

Educational Background: Gonzaga University (B.S. Economics and Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/24 to Present); Associate Portfolio Manager, Parametric (08/21-12/23); Portfolio Analyst, Parametric (10/19-07/21)

Disciplinary Information

Mr. McLaren does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. McLaren is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. McLaren is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Kevin Tjernberg, Executive Director, supervises Mr. McLaren and is responsible for monitoring the advice Mr. McLaren provides to clients. Mr. Tjernberg can be reached at (206) 381-6419.

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Diellza Mehmeti

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Telephone: (206) 735-0052
Diellza.mehmeti@parametricportfolio.com

Year of Birth: 1990

Educational Background and Business Experience

Educational Background: Rochester Institute of Technology (B.S., Applied Science); Alaska Pacific University (M.B.A)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/22 to Present); Associate Portfolio Manager, Parametric (04/20-12/21)

Disciplinary Information

Ms. Mehmeti does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Mehmeti is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Mehmeti receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Kevin Tjernberg, Executive Director, supervises Ms. Mehmeti and is responsible for monitoring the advice Ms. Mehmeti provides to clients. Mr. Tjernberg can be reached at (206) 381-6419.

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Matthew Michalak

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Telephone: (206) 405-3034
Matt.michalak@parametricportfolio.com

Year of Birth: 1981

Educational Background and Business Experience

Educational Background: University of Washington (B.A., Business Administration)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (09/24 to Present); Supervisor, Investment Analysis, Parametric (02/22-08/24); Poker Dealer, Fortune Poker (10/17-08/24)

Disciplinary Information

Mr. Michalak does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Michalak is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Michalak is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Hang Ngyuen, Executive Director, CPM, supervises Mr. Michalak and is responsible for monitoring the advice Mr. Michalak provides to clients. Ms. Nguyen can be reached at (206) 381-6428.

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Jennifer Mihara

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Telephone: (206) 694-5514
Jennifer.mihara@parametricportfolio.com

Year of Birth: 1978

Educational Background and Business Experience

Educational Background: Colgate University (B.A.)

Business Experience: Managing Director, Head of Equity Fund Management (01/25 to Present); Managing Director, Centralized Portfolio Management, Parametric (01/20 to 12/24); Director, Custom Core Portfolio Management, Parametric (2018-2019)

Disciplinary Information

Ms. Mihara does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Mihara is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Mihara receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Brian Herscovici, Chief Operating Officer, Investments, supervises Ms. Mihara and is responsible for monitoring the advice Ms. Mihara provides to clients. Mr. Herscovici can be reached at (206) 405-3041.

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Matthew Montella

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Year of Birth: 1994

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Stony Brook University (B.S., Applied Mathematics & Statistics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates, LLC (08/23 to Present); Financial Analyst, The Harvest Group (03/19-07/23)

Disciplinary Information

Mr. Montella does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Montella is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Montella is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Adriana Chaturvedi, Sr. Portfolio Manager, supervises Mr. Montella and is responsible for monitoring the advice Mr. Montella provides to clients. Ms. Chaturvedi can be reached at (206) 405-3014.

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Natalie Moorse

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Telephone: (952 767 7735
natalie.moorse@parametricportfolio.com

Year of Birth: 1995

Educational Background and Business Experience

Educational Background: University of St. Thomas (B.A. Business Administration, 2017)

Business Experience: Vice President, Parametric Portfolio Associates LLC (01/23 to Present); Associate, Parametric (06/17 to 01/23)

Disciplinary Information

Ms. Moorse does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Moorse is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Ms. Moorse receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Ms. Moorse is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Moorse is not compensated for providing advisory services outside of her responsibilities at Parametric and EVD.

Supervision

Jaylene Howard, Head of Client & Consultant Relations supervises Ms. Moorse. She is responsible for monitoring the advice Ms. Moorse provides to clients. Ms. Howard can be reached at 206 305 8747.

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Arianna Morgan

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Arianna.morgan@parametricportfolio.com

Year of Birth: 1991

Educational Background and Business Experience

Educational Background: Arizona State University (B.S., Economics); University of Utah (M.S., Finance)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (05/21 to Present); Vice President, Product Controller, Goldman Sachs (07/13-12/20)

Disciplinary Information

Ms. Morgan does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Morgan is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Morgan receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Galina Warner, Executive Director, Custom Core, supervises Ms. Morgan and is responsible for monitoring the advice Ms. Morgan provides to clients. Ms. Warner can be reached at (206) 233-2242.

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Jason Morrall

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Jason.morrall@parametricportfolio.com

Year of Birth: 1993

Educational Background and Business Experience

Educational Background: Lake Forest College (B.A. Finance, B.A. Politics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/2024 to Present); Vice President – Portfolio Manager, Huntington National Bank (07/22 – 12/23); Vice President – Interest Rate Sales, Citigroup Global Markets (2015-2022)

Disciplinary Information

Mr. Morrall does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Morrall is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Morrall receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Tyler Nowicki, Sr. Portfolio Manager, supervises Mr. Morrall and is responsible for monitoring the advice he provides to clients. Mr. Nowicki can be reached at (952) 737 6811.

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Antony Motl

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antony.motl@parametricportfolio.com

Year of Birth: 1982

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: North Dakota State University (B.A. in Business Administration, Finance, 2008)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (2008 to Present),

Disciplinary Information

Mr. Motl does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Motl is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Motl receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Dan Wamre, Director, Investment Strategy, supervises Mr. Motl and is responsible for monitoring the advice he provides to clients. Mr. Wamre can be reached at (952) 767 7710.

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Jan Mowbray

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Telephone: (952) 737 6828
jan.mowbray@parametricportfolio.com

Year of Birth: 1961

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Metropolitan State University (B.A. in Individualized Studies, Business/Finance, 2014)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (12/21 to Present); Associate Portfolio Manager, Parametric Portfolio Associates LLC (6/15 to 12/21)

Disciplinary Information

Ms. Mowbray does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Mowbray is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Mowbray receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Antony Motl, Portfolio Manager, supervises Ms. Mowbray and is responsible for monitoring the advice she provides to clients. Mr. Motl can be reached at (952) 767 7732.

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Mayumi Nabb

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Mayumi.nabb@parametricportfolio.com

Year of Birth: 1980

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Rhode Island College (B.A., Physics); Texas A&M University (M.S., Mathematics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/22 to Present); Associate Portfolio Manager, Parametric (11/19-12/21)

Disciplinary Information

Ms. Nabb does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Nabb is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Nabb is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Sam Hodge, Senior Portfolio Manager, supervises Ms. Nabb and is responsible for monitoring the advice Ms. Nabb provides to clients. Mr. Hodge can be reached at (206) 405-3006.

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Michael Nappi

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Boston, MA 02109
Telephone: (617) 672-8466
michael.nappi@parametricportfolio.com

Year of Birth: 1977

Educational Background and Business Experience

Educational Background: Fairfield University (B.S. Mathematics)

Business Experience: Director, Portfolio Management and Trading, Parametric Portfolio Associates LLC (01/22 to Present); Corporate Bond/Preferred Stock Trader, Eaton Vance (10/00 – 01/22)

Disciplinary Information

Mr. Nappi does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Nappi is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Nappi receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Brian Barney, Managing Director, Institutional Portfolio Management supervises Mr. Nappi and is responsible for monitoring the advice Mr. Nappi provides to clients. Mr. Barney can be reached at (212) 205-9003.

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Jason Nelson

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Minneapolis, MN 55435
Telephone: (952) 767 7871
Jason.nelson@parametricportfolio.com

Year of Birth: 1985

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Minnesota State University, Mankato (B.S. in Finance and Economics, 2008)

Business Experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/25 to current); Senior Portfolio Manager, Parametric (1/22 to 12/24); Portfolio Manager, Parametric (11/16 to 1/22)

Disciplinary Information

Mr. Nelson does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Nelson is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Nelson receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Clint Talmo, Managing Director, Investment Strategy, supervises Mr. Nelson and is responsible for monitoring the advice he provides to clients. Mr. Talmo can be reached at (952) 737 6816.

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Hang Nguyen

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Seattle, Washington 98104
Telephone: (206) 381-6428
Hang.nguyen@parametricportfolio.com

Year of Birth: 1979

Educational Background and Business Experience

Educational Background: University of Oklahoma (B.A. – Business Admin.); Seattle University (M.B.A)

Business Experience: Director, Centralized Portfolio Management, Parametric Portfolio Associates LLC (11/21-Present); Senior Portfolio Manager, Centralized Portfolio Management, Parametric (2018-2021))

Disciplinary Information

Ms. Nguyen does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Nguyen is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Nguyen receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Rodolfo Galgana, Executive Director, CPM, supervises Ms. Nguyen and is responsible for monitoring the advice Ms. Nguyen provides to clients. Mr. Galgana can be reached at (206) 381-7018.

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Tyler Nowicki

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Year of Birth: 1992

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota, Duluth (B.A. in Finance, 2014)

Business Experience: Senior Portfolio Manager, Parametric Portfolio Associates LLC (01/24 to Present); Portfolio Manager, Parametric (11/20 to 12/23); Associate Portfolio Manager, Parametric (11/16 to 10/20)

Disciplinary Information

Mr. Nowicki does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Nowicki is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Nowicki receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Clint Talmo, Managing Director, Investment Strategy, supervises Mr. Nowicki and is responsible for monitoring the advice he provides to clients. Mr. Talmo can be reached at (952) 737 6816.

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Noriko Ogawa-Ishii
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Noriko.ogawa@parametricportfolio.com

Year of Birth: 1977

Educational Background and Business Experience
Educational Background: University of Washington (B.A., Economics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates, LLC (01/24 to Present); Associate Portfolio Manager, Parametric (07/22-12/23); Manager, Investment Analysis, Parametric (11/18-06/22)

Disciplinary Information
Ms. Ogawa-Ishii does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. Ogawa-Ishii is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Ms. Ogawa-Ishii receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Adriana Chaturvedi, Sr. Portfolio Manager, supervises Ms. Ogawa-Ishii and is responsible for monitoring the advice Ms. Ogawa-Ishii provides to clients. Ms. Chaturvedi can be reached at (206) 405-3014.

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Ryan Olsen

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Ryan.olsen@parametricportfolio.com

Year of Birth: 1986

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Portland State University (B.A. Finance); University of Washington (M.S. Computational Finance and Risk Management)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (05/15 to Present)

Disciplinary Information

Mr. Olsen does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Olsen is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Olsen receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Gordon Wotherspoon, Managing Director, Head of Equity SMA, supervises Mr. Olsen and is responsible for monitoring the advice Mr. Olsen provides to clients. Mr. Wotherspoon can be reached at (206) 694-5519.

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Zach Olsen

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Minneapolis, MN 55435
Telephone: (952) 737 6850
zach.olsen@parametricportfolio.com

Year of Birth: 1985

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Wisconsin (B.A in Business Administration, 2008); University of Minnesota, Twin Cities (M.B.A., 2013)

Business Experience: Senior Portfolio Manager, Parametric Portfolio Associates LLC (1/24 to Present); Portfolio Manager, Parametric (11/20 – 12/23); Associate Portfolio Manager, Parametric (5/17 to 10/20)

Disciplinary Information

Mr. Olsen does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Olsen is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Olsen receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Sylvia Horstmann, Director, Investment Strategy, supervises Mr. Olsen and is responsible for monitoring the advice he provides to clients. Ms. Horstmann can be reached at (212) 205 9017.

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Robert Osborne
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Telephone: (206) 381-6113
Robert.osborne@parametricportfolio.com

Year of Birth:1985

Educational Background and Business Experience
Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Principia College (B.A. Political Science)

Business Experience: Senior Portfolio Manager, Institutional CPM, Parametric Portfolio Associates LLC (11/17 to Present)

Disciplinary Information
Mr. Osborne does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Osborne is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Osborne receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
James Reber, Managing Director, Institutional CPM, supervises Mr. Osborne and is responsible for monitoring the advice Mr. Osborne provides to clients. Mr. Reber can be reached at (206) 694-4145.

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Nisha M. Patel
100 Park Avenue, 33rd Floor
New York, NY 10017
Telephone: (212) 205-9007
nisha.patel@parametricportfolio.com

Year of Birth: 1982

Educational Background and Business Experience
Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: Boston University (B.S. - Finance and Accounting). Ms. Patel is a member of the New York Society of Security Analysts

Business experience: Managing Director, SMA Portfolio Management, Parametric Portfolio Associates LLC (01/22 to Present); Director, Portfolio Management, Parametric (01/20 – 01/22); Vice President and Portfolio Manager, Eaton Vance Management (01/09 – 01/20)

Disciplinary Information
Ms. Patel does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. Patel is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Ms. Patel receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Jonathan Rocafort, Head of Fixed Income, supervises Ms. Patel and is responsible for monitoring the advice Ms. Patel provides to clients. Mr. Rocafort can be reached at (212) 205-9000.

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Corinne Pekoske
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Minneapolis, MN 55435
Telephone: (857) 278-1210
corinne.pekoske@parametricportfolio.com

Year of Birth: 1992

Educational Background and Business Experience

Designations: CFA

Educational Background: Northeastern University (B.S. Business Administration, 2014)

Business Experience: Director, Consultant Relations, Parametric Portfolio Associates LLC (01/23 to Present); Associate Director, Consultant Relations, Parametric (08/0 to 12/22); Senior Associate, Consultant Relations, Parametric (11/18 – 08/20)

Disciplinary Information

Ms. Pekoske does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Pekoske is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Ms. Pekoske receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Ms. Pekoske is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Pekoske is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Jaylene Howard, Head of Client & Consultant Relations supervises Ms. Pekoske. She is responsible for monitoring the advice Ms. Pekoske provides to clients. Ms. Howard can be reached at 206 305 8747.

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Richard Perrins
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Telephone: (206) 233-2201
Richard.perrins@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience
Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Babson College (B.S. Business Administration)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (2016 to Present)

Disciplinary Information
Mr. Perrins does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Perrins is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Perrins receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Mr. Germann, Director of Global Portfolio Management, supervises Mr. Perrins and is responsible for monitoring the advice Mr. Perrins provides to clients. Mr. Germann can be reached at (206) 694-4121.

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David Phillips

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Telephone: (206) 381-7038
david.phillips@parametricportfolio.com

Year of Birth: 1964

Educational Background and Business Experience

Designations: CFA, CAIA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: University of Wyoming (B.S., Mathematics), Oregon State University (M.S. Mathematics)

Business Experience: Director, Liability-Driven Investment Strategies, Parametric Portfolio Associates LLC (07/19 to Present)

Disciplinary Information

Mr. Phillips does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Phillips is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Phillips is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Richard Fong, Managing Director, supervises Mr. Phillips and is responsible for monitoring the advice Mr. Phillips provides to clients. Mr. Fong can be reached at (952) 767-7721.

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Tim Post

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tim.post@parametricportfolio.com

Year of Birth: 1984

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota (B.A. in Finance, 2006)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (10/19 to Present)

Disciplinary Information

Mr. Post does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Post is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Post receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Zach Olsen, Portfolio Manager, supervises Mr. Post and is responsible for monitoring the advice he provides to clients. Mr. Olsen can be reached at (952) 767 6850.

Parametric

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Chris Powers

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Boston, MA 02109
Telephone: (617) 672 6863
chris.powers@parametricportfolio.com

Year of Birth: 1985

Educational Background and Business Experience

Designations: CFA, CAIA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: Trinity College (B.S. Economics, 2009)

Business Experience: Executive Director, Parametric Portfolio Associates LLC (07/18 to Present)

Disciplinary Information

Mr. Powers does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Powers is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Powers receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Powers is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Powers is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Chris Uhas, Head of Institutional Distribution, supervises Mr. Powers. He is responsible for monitoring the advice Mr. Powers provides to clients. Mr. Uhas can be reached at 952 767-7733.

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Dina Putrya-Momotok

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Dina.putrya@parametricportfolio.com

Year of Birth: 1989

Educational Background and Business Experience

Designations: CFA, CAIA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (B.A., Business & Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (10/22 to Present); Client Service Associate, Parametric (01/21-10/22)

Disciplinary Information

Ms. Putrya-Momotok does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Putrya-Momotok is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Putrya-Momotok is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Gigi Liu, Executive Director, supervises Ms. Putrya-Momotok and is responsible for monitoring the advice Ms. Putrya-Momotok provides to clients. Ms. Liu can be reached at (206) 381-7032.

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James Reber

800 Fifth Avenue, Suite 2800
Seattle, Washington 98104
Telephone: (206) 694-4145
James.reber@parametricportfolio.com

Year of Birth: 1968

Educational Background and Business Experience

Educational Background: Michigan State University (B.S. in Chemical Engineering); University of Washington (M.B.A.)

Business Experience: Managing Director - Portfolio Management, Parametric Portfolio Associates LLC (11/14 to Present)

Disciplinary Information

Mr. Reber does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Reber is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Reber receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jennifer Mihara, Managing Director, Head of Equity Fund Management, supervises Mr. Reber and is responsible for monitoring the advice Mr. Reber provides to clients. Ms. Mihara can be reached at (206) 694-5514.

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Bianca Reich

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Bianca.reich@parametricportfolio.com

Year of Birth: 1986

Educational Background and Business Experience

Educational Background: Institute of Economics, Federal University of Rio De Janeiro (B.S., Economics); Institute of Economics, Catholic University of the Sacred Heart (M.S., Economics)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (07/22 to Present); Client Services Manager, Invesco (09/21-07/22); Sr. Associate-Client Service Solutions, Parametric (05/19-08/21)

Disciplinary Information

Ms. Reich does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Reich is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Reich is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Kevin Tjernberg, Executive Director, supervises Ms. Reich and is responsible for monitoring the advice Ms. Reich provides to clients. Mr. Tjernberg can be reached at (206) 381-6419.

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Jonathan Rocafort

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Telephone: (212) 205-9000
jonathan.rocafort@parametricportfolio.com

Year of Birth: 1979

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: Boston College (B.S. Marketing and Philosophy)

Business experience: Head of Fixed Income Solutions, Parametric Portfolio Associates LLC (01/22 to Present); Managing Director, SMA Portfolio Management, Parametric (01/20 – 01/22); Vice President, Co-Director of SMA Strategies, Portfolio Manager, Eaton Vance Management (2009-2020)

Disciplinary Information

Mr. Rocafort does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Rocafort is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Rocafort receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Thomas Lee, Chief Investment Officer, supervises Mr. Rocafort and is responsible for monitoring the advice Mr. Rocafort provides to clients. Mr. Lee can be reached at (952) 767-7730.

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Erik L. Rollie

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Telephone: (952) 737 6887
erik.rollie@parametricportfolio.com

Year of Birth: 1984

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Gustavus Adolphus College (B.A. in Financial Economics, 2007); University of Minnesota (M.B.A., 2013)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (11/22 to Present); Manager, 3M Company (2018-2022)

Disciplinary Information

Mr. Rollie does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Rollie is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Rollie receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Drew Carlson, Sr. Portfolio Manager, supervises Mr. Rollie and is responsible for monitoring the advice he provides to clients. Mr. Carlson can be reached at (952) 737 6836.

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Violetta Romanchenko

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Boston, MA 02110
Telephone: (617) 672-6079
Violetta.romanchenko@parametricportfolio.com

Year of Birth: 1988

Educational Background and Business Experience

Educational Background: Plekhanov Russian University of Economics – International Business School; (Master of Economics, International Corporate Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/24 to Present); Associate Portfolio Manager, Parametric (03/22-12/23); Sr. Investment Analyst, Parametric (01/22-03/22); Investment Analyst, Parametric (10/20-12/21); Associate, Client Service Solutions, Parametric (07/19-10/20)

Disciplinary Information

Ms. Romanchenko does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Romanchenko is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Romanchenko is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Simba Change, Senior Portfolio Manager, supervises Ms. Romanchenko and is responsible for monitoring the advice Ms. Romanchenko provides to clients. Mr. Change can be reached at (770) 871-7014.

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Evan Rourke

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Year of Birth: 1964

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: State University of New York at Stony Brook (B.A. History); University of Phoenix (M.B.A.)

Business Experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/20 to Present); Vice President and Portfolio Manager, Eaton Vance Management (2009-2020)

Disciplinary Information

Mr. Rourke does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Rourke is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Rourke receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Nisha Patel, Managing Director, SMA Portfolio Management, supervises Mr. Rourke and is responsible for monitoring the advice Mr. Rourke provides to clients. Ms. Patel can be reached at (212) 205-9007.

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Christopher Rowe

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Year of Birth:1987

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Massachusetts, Dartmouth (B.S., Finance)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associate LLC (08/24 to Present); Vice President, ETF Capital Markets, BlackRock (11/22-10/23); Portfolio Manager, Columbia Threadneedle Investments (06/18-11/22)

Disciplinary Information

Mr. Rowe does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Rowe is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Rowe receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

James Reber, Managing Director, Institutional CPM, supervises Mr. Rowe and is responsible for monitoring the advice Mr. Rowe provides to clients. Mr. Reber can be reached at (206) 694-4145.

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Robert Rowe

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Bob.rowe@parametricportfolio.com

Year of Birth: 1984

Educational Background and Business Experience

Educational Background: Washington University, St. Louis (B.S., Mechanical Engineering)

Business Experience: Sr. Portfolio Manager, Parametric Portfolio Associates LLC (01/24 to Present); Director of Investment Engineering & Analysis, Parametric (01/20-12/23)

Disciplinary Information

Mr. Rowe does not have any disciplinary events to disclose.

Other Business Activities

Mr. Rowe is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Rowe receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Thomas Hardy, Director, Global Portfolio Management, supervises Mr. Rowe. He is responsible for monitoring the advice Mr. Rowe provides to clients. Mr. Hardy can be reached at (206)-381-6118.

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Dan Ryan

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Seattle, Washington 98104
Telephone: (206) 381 7036
dan.ryan@parametricportfolio.com

Year of Birth: 1976

Educational Background and Business Experience

Educational Background: University of Michigan (B.A. History, 1998)

Business Experience: Executive Director, Parametric Portfolio Associates LLC (10/13 to Present)

Disciplinary Information

Mr. Ryan does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Ryan is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Ryan receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Ryan is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Ryan is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Jaylene Howard, Head of Client & Consultant Relations supervises Mr. Ryan. She is responsible for monitoring the advice Mr. Ryan provides to clients. Ms. Howard can be reached at 206 305 8747.

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Moises Sanchez Garcia
3600 Minnesota Drive, Suite 200
Minneapolis, MN 55435
Telephone: (651) 391-1923
moises.sanchez.garcia@parametricportfolio.com

Year of Birth: 1996

Educational Background and Business Experience
Educational Background: University of St. Thomas (B.A., Financial Management)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (2019 to Present)

Disciplinary Information
Mr. Sanchez Garcia does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Sanchez Garcia is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Sanchez Garcia receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Heather Wolf, Portfolio Manager, supervises Mr. Sanchez Garcia and is responsible for monitoring the advice he provides to clients. Ms. Wolf can be reached at (952) 767 7759.

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Bryan Sandvig
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Minneapolis, MN 55435
Telephone: (952) 737-6864
Bryan.sandvig@parametricportfolio.com

Year of Birth: 1988

Educational Background and Business Experience
Educational Background: Wheaton College (B.A. Business Economics, 2010)

Business Experience: Executive Director, Parametric Portfolio Associates LLC (11/18 to Present)

Disciplinary Information
Mr. Sandvig does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Sandvig is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Sandvig receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Sandvig is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Sandvig is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision
Chris Uhas, Head of Institutional Distribution, supervises Mr. Sandvig. He is responsible for monitoring the advice Mr. Sandvig provides to clients. Mr. Uhas can be reached at 952 767 7733.

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Bernard Scozzafava

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bernard.scozzafava@parametricportfolio.com

Year of Birth: 1961

Educational Background and Business Experience

Designations: CFA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: Hamilton College (B.A. Economics and Mathematics); MIT Sloan School of Management (M.S.). He is a member of the Boston Security Analysts Society.

Business Experience: Director, Quantitative Research and Portfolio Management, Parametric Portfolio Associates LLC (01/20 to Present). Director of Diversified Fixed Income Quantitative Research, Eaton Vance Management (2006-2020)

Disciplinary Information

Mr. Scozzafava does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Scozzafava is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Scozzafava is not compensated for providing advisory services outside of his position at Parametric.

Supervision

Brian Barney, Managing Director, Institutional Portfolio Management and Trading supervises Mr. Scozzafava and is responsible for monitoring and is responsible for monitoring the advice Mr. Scozzafava provides to clients. Mr. Barney can be reached at (212) 205-9003.

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Ellen Seibel

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Minneapolis, MN 55435
Telephone: (952) 208-8309
Ellen.seibel@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: Bethel University of Minnesota (B.A., Business - Finance and Marketing)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Sr. Investment Analyst, Parametric (01/24-12/24); Investment Analyst, Parametric (06/21-12/23)

Disciplinary Information

Ms. Seibel does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Seibel is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Seibel receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Heather Wolf, Portfolio Manager, supervises Ms. Seibel and is responsible for monitoring the advice Ms. Seibel provides to clients. Ms. Wolf can be reached at (952) 767 7759.

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Forrest Simensen

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Forrest.simensen@parametricportfolio.com

Year of Birth: 1981

Educational Background and Business Experience

Educational Background: University of Wisconsin (B.A., Cartography and Geographic Information Systems); Boston University (M.S., Investment Management)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (04/22 to Present); Senior Manager LFO, Ameriprise Financial (03/19-03/22)

Disciplinary Information

Mr. Simensen does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Simensen is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Simensen receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Andrew Subkoviak, Executive Director, Custom Core Portfolio Management, supervises Mr. Simensen and is responsible for monitoring the advice Mr. Simensen provides to clients. Mr. Subkoviak can be reached at (206) 353-0486.

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Jeremy Smith

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Year of Birth: 1972

Educational Background and Business Experience

Designations: CFA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: University of Minnesota, Duluth (B.A. Business Administration)

Business Experience: Executive Director, Parametric Portfolio Associates LLC (05/17 to Present)

Disciplinary Information

Mr. Smith does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Smith is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Smith receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Smith is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Smith is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Jaylene Howard, Head of Client & Consultant Relations supervises Mr. Smith. She is responsible for monitoring the advice Mr. Smith provides to clients. Ms. Howard can be reached at 206 305 8747.

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Nick Stahelski

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Telephone: (617) 763-7237
nicholas.stahelski@parametricportfolio.com

Year of Birth: 1991

Educational Background and Business Experience

Educational Background: College of Holly Cross (B.A. Economics)

Business experience: Vice President, Portfolio Manager, Parametric Portfolio Associates LLC (03/22 to Present); Assistant Vice President, Portfolio Manager, Eaton Vance Management (2016-2022)

Disciplinary Information

Mr. Stahelski does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Stahelski is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Stahelski receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Nisha Patel, Managing Director, is responsible for monitoring the advice Mr. Stahelski provides to clients. Ms. Patel can be reached at (212) 205-9007.

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Robert Stiller

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Year of Birth: 1990

Educational Background and Business Experience

Educational Background: Saint John's University (B.A. in Biology, 2012); University of Minnesota (M.S. in Finance, 2018)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (1/22 to Present); Senior Investment Analyst, Parametric (11/19-1/22)

Disciplinary Information

Mr. Stiller does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Stiller is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Stiller receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Dane Fickel, Sr. Portfolio Manager, supervises Mr. Stiller and is responsible for monitoring the advice he provides to clients. Mr. Fickel can be reached at (952) 767 7704.

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Andrew Subkoviak

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Andrew.subkoviak@parametricportfolio.com

Year of Birth: 1977

Educational Background and Business Experience

Educational Background: University of Wisconsin (B.S. Economics); University of Washington (M.A., Economics, Certificate in Computational Finance)

Business Experience: Director, Custom Core Portfolio Management, Parametric Portfolio Associates LLC (04/11 to Present)

Disciplinary Information

Mr. Subkoviak does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Subkoviak is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Subkoviak receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Gordon Wotherspoon, Managing Director, Head of Equity SMA, supervises Mr. Subkoviak and is responsible for monitoring the advice Mr. Subkoviak provides to clients. Mr. Wotherspoon can be reached at (206) 694-5519.

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Shawn Sunshine

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Alpharetta, GA 30005
Telephone: (678) 282-8975
Shawn.sunshine@parametricportfolio.com

Year of Birth: 1990

Educational Background and Business Experience

Educational Background: University of Houston (B.S., Mathematics); Purdue University (M.S., Mathematics)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (10/23 to Present); Finance Comptroller Officer, U.S. Army Reserve (06/13 to Present); Quantitative and Model Analyst, TD Securities (07/22-10/23); Graduate Teaching Assistant, Purdue University (08/17-05/22)

Disciplinary Information

Mr. Sunshine does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Sunshine currently serves as a Finance Comptroller in the U.S. Army Reserve and receives compensation for his service. This activity does not create a material conflict of interest with clients. This activity does not provide Mr. Sunshine a substantial amount of income or involve a substantial amount of his time. Mr. Sunshine is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Sunshine receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Michelle Li, Vice President, supervises Mr. Sunshine and is responsible for monitoring the advice Mr. Sunshine provides to clients. Ms. Li can be reached at (206) 470-2406.

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Shalini Suresh
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Year of Birth: 1978

Educational Background and Business Experience
Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Bangalor University (B.S. Chemistry and Biology); City University of Seattle (M.B.A., Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates, LLC (04/22 to Present)*

Disciplinary Information
Ms. Suresh does not have any legal or disciplinary events to disclose.

Other Business Activities
Ms. Suresh is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Ms. Suresh is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision
Adriana Chaturvedi, Sr. Portfolio Manager, supervises Ms. Suresh and is responsible for monitoring the advice Ms. Suresh provides to clients. Ms. Chaturvedi can be reached at (206) 405-3014.

*Ms. Suresh was unemployed between 2020 and April 2022.

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Samuel Swartz
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Seattle, Washington 98104
Telephone: (206) 381-6128
Sam.swartz@parametricportfolio.com

Year of Birth: 1979

Educational Background and Business Experience

Educational Background: Western Washington University (B.A. Business Administration); Seattle University (M.B.A.)

Business Experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (03/20 to Present); Director, Custom Core Portfolio Management, Parametric (04/08 to 03/20)

Disciplinary Information

Mr. Swartz does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Swartz is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Swartz receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Gordon Wotherspoon, Managing Director, Head of Equity SMA, supervises Mr. Swartz and is responsible for monitoring the advice Mr. Swartz provides to clients. Mr. Wotherspoon can be reached at (206) 694-5519.

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Clinton Talmo

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Clint.talmo@parametricportfolio.com

Year of Birth: 1981

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Colorado (B.S. Finance, 2003)

Business Experience: Managing Director, Investment Strategy, Parametric Portfolio Associates LLC (01/23 to Present); Director, Investment Strategy, Parametric (11/19 to 01/23)

Disciplinary Information

Mr. Talmo does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Talmo is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Talmo receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Thomas Lee, Chief Investment Officer, supervises Mr. Talmo and is responsible for monitoring the advice he provides to clients. Mr. Lee can be reached at (952) 767 7730.

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Kyle Tenczar

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Kyle.tenczar@parametricportfolio.com

Year of Birth: 1995

Educational Background and Business Experience

Educational Background: Bentley University (B.S., Finance); Johns Hopkins University (candidate: M.S., Applied and Computational Mathematics, est. graduation 2026)

Business Experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (08/24 to Present); Sr. Quantitative Analyst, NEPC LLC (02/20-08/24)

Disciplinary Information

Mr. Tenczar does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Tenczar is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Tenczar receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Michelle Li, Vice President, supervises Mr. Tenczar and is responsible for monitoring the advice Mr. Tenczar provides to clients. Ms. Li can be reached at (206) 470-2406.

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James Thorson

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james.thorson@parametricportfolio.com

Year of Birth: 1991

Educational Background and Business Experience

Designations: CFA, CAIA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota (B.S. in Finance, 2013)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (11/16 to Present)

Disciplinary Information

Mr. Thorson does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Thorson is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Thorson receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Dan Wamre, Director, Investment Strategy supervises Mr. Thorson and is responsible for monitoring the advice he provides to clients. Mr. Wamre can be reached at (952) 767 7710.

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Kevin Tjernberg

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Year of Birth:1994

Educational Background and Business Experience

Designations: CFA, CAIA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Washington (B.A., Business Administration)

Business Experience: Executive Director, Custom Core, Parametric Portfolio Associates LLC (06/19 to Present)

Disciplinary Information

Mr. Tjernberg does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Tjernberg is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Tjernberg receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Sam Swartz, Executive Director, supervises Mr. Tjernberg and is responsible for monitoring the advice Mr. Tjernberg provides to clients. Mr. Swartz can be reached at (206) 381-6128.

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Chris Uhas

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Minneapolis, MN 55435
Telephone: (952) 767-7733
chris.uhas@parametricportfolio.com

Year of Birth: 1970

Educational Background and Business Experience

Designations: CFA (Please see Summary of Professional Designations on Appendix A.)

Educational Background: University of Notre Dame (B.S. Electrical Engineering); University of Chicago (M.B.A.)

Business Experience: Managing Director, Head of Institutional Distribution, Parametric Portfolio Associates LLC (10/22 to Present); Managing Director, Head of Institutional Business Development, Parametric (01/18 to 10/22)

Disciplinary Information

Mr. Uhas does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Uhas is a registered representative of Eaton Vance Distributors Inc. (EVD), a registered broker-dealer affiliated with Parametric. As such, Mr. Uhas receives compensation from EVD in connection with the sale of various private and public investment funds sponsored by affiliates of Parametric. Mr. Uhas is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Uhas is not compensated for providing advisory services outside of his responsibilities at Parametric and EVD.

Supervision

Tom Lee, the Co-President and Chief Investment Officer of Parametric, supervises Mr. Uhas. He is responsible for monitoring the advice Mr. Uhas provides to clients. Mr. Lee can be reached at 952 767 7730.

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Matt Ursillo
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New York, NY 10017
Telephone: (212) 296-7045
matthew.ursillo@parametricportfolio.com

Year of Birth: 1989

Educational Background and Business Experience
Educational Background: Union College (B.A.)

Business experience: Vice President, Sr. Portfolio Manager, Parametric Portfolio Associates LLC (01/25 to Present); Vice President, Portfolio Manager, Parametric (05/23 to 12/24); Vice President, Morgan Stanley Investment Management (2013 to 2023)

Disciplinary Information
Mr. Ursillo does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Ursillo is not actively engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Ursillo receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Devin Cooch, Director, supervises Mr. Ursillo and is responsible for monitoring the advice Mr. Ursillo provides to clients. Mr. Cooch can be reached at (212) 205-9010.

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William VanSant

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William.vansant@parametricportfolio.com

Year of Birth: 1992

Educational Background and Business Experience

Educational Background: Georgia Southern University (B.S., Finance; B.A. Psychology)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (04/22 to Present); Product Manager, Invesco (02/19-04/22)

Disciplinary Information

Mr. VanSant does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. VanSant is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. VanSant receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Simba Change, Senior Portfolio Manager, supervises Mr. VanSant and is responsible for monitoring the advice Mr. VanSant provides to clients. Mr. Change can be reached at (770) 871-7014.

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Anthony Venegas

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Seattle, Washington 98104
Telephone: (206) 470 2317
Anthony.venegas@parametricportfolio.com

Year of Birth: 1990

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Pacific Lutheran University, M.S. Finance; Pacific Lutheran University, B.A. Finance

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/22 to Present); Associate Portfolio Manager, Parametric (12/19 – 01/22); Risk Consultant, BNY Mellon (03/18 – 12/19)

Disciplinary Information

Mr. Venegas does not have any disciplinary events to disclose.

Other Business Activities

Mr. Venegas is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Venegas receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Thomas Hardy, Director, Global Portfolio Management, supervises Mr. Venegas. He is responsible for monitoring the advice Mr. Venegas provides to clients. Mr. Hardy can be reached at (206)-381-6118.

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Alison Wagner

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alison.wagner@parametricportfolio.com

Year of Birth: 1989

Educational Background and Business Experience

Designations: CFA (See Appendix for Summary of Professional Designations.)

Educational Background: Boston College (B.S., Finance)

Business Experience: Director, Portfolio Management, Parametric Portfolio Associates LLC (01/24 to Present); Vice President, Portfolio Manager, Parametric (06/15 to 12/23)

Disciplinary Information

Ms. Wagner does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Wagner is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Wagner receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Brian Barney, Managing Director – Institutional Portfolio Management and Trading, supervises Ms. Wagner and is responsible for monitoring the advice Ms. Wagner provides to clients. Mr. Barney can be reached at (212) 205-9003.

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Daniel Wamre

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Minneapolis, MN 55435
Telephone: (952) 767 7710
daniel.wamre@parametricportfolio.com

Year of Birth: 1969

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: North Dakota State University (B.S. in History); University of Minnesota (M.B.A. in Finance)

Business Experience: Director, Investment Strategy, Parametric Portfolio Associates LLC (11/14 to Present)

Disciplinary Information

Mr. Wamre does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Wamre is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Wamre receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Richard Fong, Managing Director, Investment Strategy, supervises Mr. Wamre and is responsible for monitoring the advice he provides to clients. Mr. Fong can be reached at (952) 767 7721.

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Galina Warner

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Telephone: (206) 719-2630
Galina.warner@parametricportfolio.com

Year of Birth: 1982

Educational Background and Business Experience

Educational Background: LDS Business College (A.A., Business); Brigham Young University (B.A. Business Administration/Finance); University of Washington (M.S. Computational Finance & Risk Management)

Business Experience: Executive Director, Portfolio Manager, Parametric Portfolio Associates LLC (04/22 to Present); Portfolio Manager, Parametric (09/16-03/22)

Disciplinary Information

Ms. Warner does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Warner is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Warner receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Gordon Wotherspoon, Managing Director, Equity SMA supervises Ms. Warner and is responsible for monitoring the advice Ms. Warner provides to clients. Mr. Wotherspoon can be reached at (206) 694-5519.

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Heather Wolf

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Telephone: (952) 767 7759
heather.wolf@parametricportfolio.com

Year of Birth: 1994

Educational Background and Business Experience

Designations: CFA – See Summary of Professional Designations on Appendix A

Educational Background: St. Olaf College (B.A. in Religion and Economics with a focus in Finance, 2016)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Associate Portfolio Manager, Parametric (8/19 to 1/23)

Disciplinary Information

Ms. Wolf does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Wolf is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Wolf receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Dan Wamre, Director, Investment Strategy, supervises Ms. Wolf and is responsible for monitoring the advice Ms. Wolf provides to clients. Mr. Wamre can be reached at (952) 767 7710.

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Jake Wolfe
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Jake.wolfe@parametricportfolio.com

Year of Birth: 1991

Educational Background and Business Experience
Designations: CFA, CAIA - See Summary of Professional Designations on Appendix A.

Educational Background: George Mason University (B.S., Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Associate Portfolio Manager, Parametric (10/20-12/22)

Disciplinary Information
Mr. Wolfe does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Wolfe is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Wolfe receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Mr. Germann, Executive Director, Global Equities supervises Mr. Wolfe and is responsible for monitoring the advice Mr. Wolfe provides to clients. Mr. Germann can be reached at (206) 694-4121.

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Colt Wolfram

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Telephone: (952) 737 6825
colt.wolfram@parametricportfolio.com

Year of Birth: 1993

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: University of Minnesota Duluth, (B.A. Business Administration, Finance, 2015)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Associate Portfolio Manager, Parametric (6/15 to 1/23)

Disciplinary Information

Mr. Wolfram does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Wolfram is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Wolfram receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Clint Talmo, Managing Director, Investment Strategy, supervises Mr. Wolfram and is responsible for monitoring the advice he provides to clients. Mr. Talmo can be reached at (952) 737 6816.

Parametric

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Gordon Wotherspoon
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Gordon.wotherspoon@parametricportfolio.com

Year of Birth: 1977

Educational Background and Business Experience
Educational Background: University of Washington (B.S. in Economics), University of Washington (M.B.A.)

Business Experience: Managing Director, Head of Equity SMA, Parametric Portfolio Associates LLC (01/25 to Present); Managing Director of Advisor Channel Portfolio Management, Parametric (11/16 to 12/24)

Disciplinary Information
Mr. Wotherspoon does not have any legal or disciplinary events to disclose.

Other Business Activities
Mr. Wotherspoon is not currently engaged in any other investment-related business or occupation.

Additional Compensation
Mr. Wotherspoon receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision
Brian Herscovici, Chief Operating Officer, Investments, supervises Mr. Wotherspoon and is responsible for monitoring the advice Mr. Wotherspoon provides to clients. Mr. Herscovici can be reached at (206) 405-3041.

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Michael Zaslavsky

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Year of Birth: 1986

Educational Background and Business Experience

Designations: CAIA, CFA - See Summary of Professional Designations on Appendix A.

Educational Background: Bowling Green State University (B.S. Finance, 2008)

Business Experience: Director, Investment Strategy, Parametric Portfolio Associates LLC (01/25 to current); Sr. Investment Strategist, Parametric (11/15 to 12/24)

Disciplinary Information

Mr. Zaslavsky does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Zaslavsky is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Zaslavsky receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Alex Zweber, Managing Director, Investment Strategy, supervises Mr. Zaslavsky and is responsible for monitoring the advice he provides to clients. Mr. Zweber can be reached at (952) 208-8319.

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Joseph Zeck

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Telephone: (952) 767 6817
joseph.zeck@parametricportfolio.com

Year of Birth: 1980

Educational Background and Business Experience

Designations: CFA - See Summary of Professional Designations on Appendix A.

Educational Background: St. Cloud State University (B.A. Finance, 2004)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (11/20 to Present); Associate Portfolio Manager, Parametric (11/14 – 11/20)

Disciplinary Information

Mr. Zeck does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Zeck is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Zeck receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Macki Anderson, Portfolio Manager, supervises Mr. Zeck and is responsible for monitoring the advice he provides to clients. Mr. Anderson can be reached at (952) 767 7864.

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Yujing Zheng

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Yujing.zheng@parametricportfolio.com

Year of Birth: 1998

Educational Background and Business Experience

Educational Background: DePaul University (M.S. Finance and M.S. Computational Finance)

Business Experience: Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Associate Portfolio Manager, Parametric (08/21-12/22); Trading Portfolio Manager, Charlesworth Research (02/16-08/21)

Disciplinary Information

Ms. Zheng does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Zheng is not currently engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Zheng is not compensated for providing advisory services outside of his responsibilities at Parametric.

Supervision

Hang Ngyuen, Executive Director, CPM, supervises Ms. Zheng and is responsible for monitoring the advice Ms. Zheng provides to clients. Ms. Nguyen can be reached at (206) 381-6428.

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Gabrielle Zona

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New York, NY 10017
Telephone: (212) 205-9000
gabrielle.zona@parametricportfolio.com

Year of Birth: 1996

Educational Background and Business Experience

Educational Background: Stonehill College (B.A. Finance)

Business experience: Associate Portfolio Manager, Parametric Portfolio Associates LLC (01/23 to Present); Portfolio Management Analyst, Parametric (08/20 to 01/23); Internal Consultant, Eaton Vance Management (2018-2020)

Disciplinary Information

Ms. Zona does not have any legal or disciplinary events to disclose.

Other Business Activities

Ms. Zona is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Ms. Zona receives a regular salary and bonus from Parametric but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Nisha Patel, Managing Director, SMA Portfolio Management, supervises Ms. Zona and is responsible for monitoring the advice Ms. Zona provides to clients. Ms. Patel can be reached at (212) 205-9007.

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Alex Zweber

3600 Minnesota Drive, Suite 200
Minneapolis, MN 55435
Telephone: (952) 208-8319
alex.zweber@parametricportfolio.com

Year of Birth: 1983

Educational Background and Business Experience

Designations: CFA, CAIA - See Summary of Professional Designations on Appendix A.

Educational Background: Macalester College (B.A. in Economics, 2006)

Business Experience: Managing Director, Investment Strategy, Parametric Portfolio Associates LLC (7/20 to Present); Senior Portfolio Manager, Parametric (1/18-6/20)

Disciplinary Information

Mr. Zweber does not have any legal or disciplinary events to disclose.

Other Business Activities

Mr. Zweber is not actively engaged in any other investment-related business or occupation.

Additional Compensation

Mr. Zweber receives a regular salary and bonus from Parametric, but does not receive any other economic benefit, such as commissions or sales awards, for providing investment advisory services to clients.

Supervision

Jennifer Sireklove, Managing Director, Investment Strategy, supervises Mr. Zweber and is responsible for monitoring the advice he provides to clients. Ms. Sireklove can be reached at (206) 381-6440.

Summary of Professional Designations

The Summary of Professional Designations is provided to assist you in evaluating the professional designations and minimum requirements of our investment professionals to hold these designations.

CAIA – Chartered Alternative Investment Analyst

- Issued by the Chartered Alternative Investment Analyst Association (CAIA). The CAIA was founded in 2002 by the Alternative Investment Management Association and the Center for International Securities and Derivatives Markets. The CAIA is an independent, not-for-profit, global organization committed to education and professionalism in the field of alternative investments. CAIA designees are required to maintain membership in the CAIA and adhere to professional and ethical standards.
- Examination Type: Two exams – Level 1 and Level 1

CFA – Chartered Financial Analyst

- Issued by the CFA Institute
- Prerequisites/Experience Required: Candidate must meet one of the following requirements:
  - Undergraduate degree and four years of professional experience involving decision-making, or
  - Four years of qualified work experience (full time, but not necessarily investment related)
- Educational Requirements: Self-study program (250 hours of study for each of the three levels)
- Examination Type: Three course exams
- Continuing Education/Experience Requirements: None

CIPM – Certificate in Investment Performance Measurement

- Professional accreditation offered by the CFA Institute, designed to educate professionals on accurately calculating and presenting investment performance figures.
- Covers key areas of performance measurement, including return and risk evaluation, manager selection and investment reporting.
- To obtain the certificate one must sequentially pass two examinations. Self-study program that typically requires 155 hours per exam.

CPA – Certified Public Accountant

- Certified Public Accountant (CPA) is the statutory title of qualified accountants in the United States who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements for licensing as a CPA.
- Licensing requirements vary by state, but typically require a bachelor's or master's degree (including certain courses in accounting and taxation) and/or at least 2-3 years of public accounting experience.
- Many states also require licensed CPAs to complete 24-40 hours of continuing education annually.