Investment Beliefs

Presenter Bio **Roger Urwin, Global Head of Investment Content, Towers Watson**

Roger Urwin is the Global Head of Investment Content at Towers Watson. His role includes work for some of the firm's major investment clients both in the United Kingdom and internationally. He leads the firm's work on transformational change and has conducted major strategic reviews at a number of global leading funds. He is also heavily involved with the Towers Watson Thinking Ahead Institute.

Prior to his current position, he was the Global Head of the investment practice from 1995 to 2008. Roger joined Watson Wyatt in 1989 to start the firm's investment consulting practice. Under his leadership, the practice grew to a global team of over 500. His previous careers involved heading the Mercer investment practice and leading the business development and quantitative investment functions at Gartmore Investment Management.

Roger's investment innovations include three global firsts: the origination of the first target date DC funds (in 1988), the risk budget framework (in 1999) and the governance budget framework for assessing asset owner organizational effectiveness (in 2007). He is also the author of a number of papers on asset allocation policy, manager selection and governance, and sustainability. He is a previous Board member of the Chartered Financial Analyst (CFA) Institute and is now on the Board of the CFA Future of Finance Council and an Advisory Director to MSCI Inc. Roger has a bachelor's degree in mathematics and a master's degree in applied statistics from Oxford University. He qualified as a Fellow of the Institute of Actuaries in 1983.

Continued on Next Page

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Presenter Bio **Adam Gillett, Investment Analyst, Towers Watson**

Adam Gillett is an investment analyst at Towers Watson. He works on the specialist client consulting team who focus on organizational effective for asset owners. Adam has a portfolio of clients across defined benefit pension schemes, sovereign wealth funds, endowments and foundations in Europe, the Middle East, and North America. The scope of advice and services covers all aspects of institutional governance alongside asset allocation strategy, liability hedging, investment manager structure, manager selection, and monitoring.

Adam graduated from Cambridge University with a first class degree in music in and studied management studies for a year at the Judge Business School. Subsequently, he spent three years at KPMG in the financial services industry, specializing in the banking sector. Adam is a fully qualified Associate Chartered Accountant and holder of the United Kingdom Society of Investment Professionals Investment Management Certificate.