Fall Speaker Series Speakers' Biographies

Michael Acton, CFA

Mr. Acton is a Managing Director of the firm and AEW's Head of Research with responsibility for directing the activities of AEW Research, the firm's in-house research group. He works closely with the Fund's investment management team in the development of the Fund's investment strategy and criteria. Mr. Acton joined the firm in 1990 and has 35 years of experience as an economic analyst and forecaster. He is a standing member of the firm's Investment Committee and Risk Management Committee. The resources of AEW Research are an integral part of AEW's investment process and Mr. Acton works closely with senior professionals in all areas of the firm to develop investment strategies that match clients' risk/reward objectives with market opportunities. Mr. Acton is also a member of the firm's Compliance Committee. Prior to joining AEW, he was with DRI/McGraw-Hill where he managed the Metropolitan Area Forecasting Service. He is a graduate of Bates College (B.A.), and a CFA charterholder, as well as a member of the CFA Institute and CFA Society Boston.

Jason English

Jason is the lead equity analyst covering the packaged food, household and personal care sectors. He joined Goldman Sachs in 2010 as a junior analyst and was named managing director in 2015.

Prior to joining the firm, Jason worked on the packaged food research team at J.P. Morgan and spent nine years working in brand management and field sales for Kellogg Company, Campbell Soup Company and Anheuser-Busch Inbev.

Jason earned a BS in Business Management and Marketing from Cornell University and an MBA in Management and Marketing from the Stern School of Business at New York University.

Kate McShane, CFA

Kate covers the US Retailing/Broadlines and Hardlines sectors at Goldman Sachs. She joined the firm as a managing director in 2019.

Before joining the firm, Kate was a managing director and global head of Consumer Discretionary at Citi covering Retailing/Broadlines & Hardlines and the Apparel & Footwear Brands. Prior to her role as an analyst, she was an associate for the Beverages and Tobacco team. Earlier in her career, Kate worked at Credit Suisse as an associate in Equity Capital Markets in London and as research analyst in New York.

Kate earned a BA in Finance from the University of Notre Dame in 1997. She is a CFA Charterholder.

Jim Paulsen

Jim is Chief Investment Strategist of The Leuthold Group, LLC. He is a member of the investment committee, authors market and economic commentary, and works with the Leuthold investment team in serving institutional, financial advisor, and investment professional clients. He will continue writing his long-running newsletter which will be published and distributed alongside our premier monthly research product, Perception for the Professional.

Paulsen has been an investment industry professional since 1983, most recently as Chief Investment Strategist at Wells Capital Management where he worked for 20 years. Prior to that, Jim was the senior managing director and Chief Investment Strategist for Investors Management Group in Des Moines, Iowa. He also served as president of SCI Capital Management in Cedar Rapids, Iowa. For more than 30 years, Jim has published commentary assessing economic and market trends. He is nationally recognized for his views on the economy, frequently appears on CNBC and Bloomberg TV, and is invited to speaking engagements across the country. He has been named a top economic forecaster by Business Week, and Money Magazine called his newsletter one of “101 Things Every Investor Should Know.” Jim earned a Bachelor degree and Doctoral degree in Economics from Iowa State University.

Jim Reid

Jim is a Managing Director and Global Head of the Fundamental Credit Strategy Group. He also heads up DB’s Thematic Research Product and Corporate Bank Research. Jim is a top-ranked strategist, consistently named the No.1 analyst in the major surveys over the last 25 years. In 2019 he was voted No.1 Strategist in four categories in the European Institutional Investor flagship Fixed Income Poll. He has had 25 No.1 positions in these awards in the last decade, more than quadruple the number of any other analyst.

His daily Early Morning Reid report has been running for over 13 years now, has tens of thousands of daily readers, and has the most subscribers of any DB research publication globally. It is one of the most widely read financial market pieces in the investment world.

Jim joined Deutsche Bank in September 2004 and has nearly 25 years of experience in Investment Banking. Before becoming a strategist, Jim spent the first three years of his career in sales covering both real money accounts and hedge funds.

Jim has a BA Degree in Economics and Economic History from Warwick.

Jonathan Root, CFA

Jonathan Root is a Senior Vice President in Moody’s Corporate Finance Group. Jonathan is the U.S. airline analyst and has rating responsibility for Enhanced Equipment Trust Certificates on a global basis. He has led Moody’s analysis on more than 60 EETCs since he began covering the airline sector in 2009. Jonathan also covers selected aerospace & defense companies including The Boeing Company, General Dynamics, Lockheed Martin, Northrup Grumman and Raytheon Technologies.

Prior to joining Moody’s, Jonathan was a Director of Finance at Automatic Data Processing, including at its European headquarters based in Paris. Jonathan started his career as an auditor with Ernst & Young and has performed different roles in financial services, including in US and Australian insolvency, litigation consulting and M&A advisory work.

Jonathan is a CFA charter holder. He has an M.B.A. in Finance from the Stern School of Business at New York University and a B.S. in Accounting and Finance from the State University of New York at Buffalo.

Peter Trombetta

Pete Trombetta is a Vice President - Senior Analyst on the Corporate Finance team. Pete is responsible for a portfolio of investment grade and non-investment grade names in the lodging, cruise, timeshare, and convenience store/fuel retailer industries. Previously, Pete covered gaming, health clubs, restaurants and business and consumer services companies. Before joining Moody’s in August 2005, Pete was an Assistant Vice President in the capital recovery group and lending groups at PNC Bank.

Pete holds an M.B.A in finance from the Stillman School of Business at Seton Hall University and received an undergraduate degree in Psychology from Widener University.