

# RUSSELL INVESTMENTS IMPLEMENTATION SERVICES, LLC



FORM ADV PART 2B BROCHURE SUPPLEMENT

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[WWW.RUSSELLINVESTMENTS.COM](http://WWW.RUSSELLINVESTMENTS.COM)

March 28, 2025

This Brochure Supplement provides information about supervised persons providing investment advisory services to Russell Investments Implementation Services, LLC ("RIIS") clients and supplements the RIIS Brochure. You should have received a copy of that Brochure. If you did not receive the Brochure or if you have any questions about the contents of this Brochure Supplement, please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com).

RIIS is an investment adviser registered with the United States Securities and Exchange Commission ("SEC"). Registration as an investment adviser does not imply any level of skill or training. The information in this Brochure Supplement has not been approved or verified by the SEC or by any state securities authority.

## Jonathan Baily

Senior Portfolio Manager, Overlay Services  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jonathan Baily and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Jonathan Baily is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1985

#### **Education and Designations:**

- B.A., Finance, University of Washington

#### **Business Background (past five years):**

- 2023 to Present - Senior Portfolio Manager, Overlay Services, Russell Investments
- 2020 to 2023 - Portfolio Manager, Overlay Services, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Jonathan.

### **OTHER BUSINESS ACTIVITIES:**

Jonathan does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Brian Causey is responsible for the supervision and oversight of Jonathan. Brian Causey is a Director, Customized Portfolio Solutions, Overlay Portfolio Management for Russell Investments and is responsible for helping to ensure Jonathan adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Brian Causey can be reached at 206.505.7877.

## Rob Balkema, CFA

Senior Director, Head of Multi-Asset, North America  
Customized Portfolio Solutions  
575 Fifth Avenue Suite 35B  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Rob Balkema and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Rob Balkema is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1984

#### **Education and Designations:**

- B.A., Harvard College
- Chartered Financial Analyst® (CFA)\*

#### **Business Background (past five years):**

- 2020 to Present - Head of Multi-Asset Solutions, North America, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Rob.

### **OTHER BUSINESS ACTIVITIES:**

Rob does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Jon Eggins is responsible for the supervision and oversight of Rob. Jon Eggins is a Managing Director, Head of Portfolio Management for Russell Investments and is responsible for helping to ensure Rob adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jon Eggins can be reached at 206.505.7877.

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\*The Chartered Financial Analyst® (CFA) charter is a globally recognized designation offered by the CFA Institute to investment professionals who have completed the CFA® Program and work experience requirements. To qualify for the CFA Program, candidates must have a bachelor's (or equivalent) degree or 4,000 hours of professional work experience and/or higher education. To earn the CFA charter, candidates must, within three years, pass three exams, complete 4,000 hours of professional work experience in the investment decision-making process, and join the CFA Institute as a regular member. CFA charterholders are required to adhere to the CFA Institute's code of ethics and professional conduct standards.

## Olga Bezrokov, CFA, FSA

Senior Portfolio Manager  
Customized Portfolio Solutions  
100 King Street West, Suite 5715  
Toronto, ON M5X 1E4, Canada  
416.362.8411



This Brochure Supplement provides information about Olga Bezrokov and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Olga Bezrokov is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1986

#### Education and Designations:

- Bachelor's of Commerce, McGill University
- Chartered Financial Analyst® (CFA)\*, The Fundamentals of Sustainability Accounting (FSA) Credential†

#### Business Background (past five years):

- 2020 to 2021 - Associate Portfolio Manager, Russell Investments
- 2021 to 2024 - Portfolio Manager, Russell Investments
- 2024 to 2025 - Senior Portfolio Manager, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Olga.

### OTHER BUSINESS ACTIVITIES:

Olga does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Rob Balkema is responsible for the supervision and oversight of Olga. Rob Balkema is a Senior Director, Head of Multi-Asset, North America for Russell Investments and is responsible for helping to ensure Olga adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Rob Balkema can be reached at 206.505.7877.

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†The Fundamentals of Sustainability Accounting (FSA) Credential is offered by the Sustainability Accounting Standards Board (SASB) and is designed to equip professionals with the knowledge and skills to understand the link between financially material sustainability information and a company's ability to drive enterprise value. The FSA Credential combines two exams to assess professional expertise in the materiality of sustainability information for corporate performance and investment analysis. Each exam requires an average of 30-50 hours of study.

## Thomas Boyd, CFA

Portfolio Manager, Customized Portfolio Solutions, Overlay Services  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Thomas Boyd and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Thomas Boyd is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1990

#### Education and Designations:

- B.S., Economics, The George Washington University
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to 2021 - Trader, Interest Rate Derivatives, HomeStreet Bank
- 2021 to 2022 - Trader, Equity and Fixed Income Derivatives, Russell Investments
- 2022 to 2023 - Trader, Equity and Fixed Income Derivatives, Russell Investments
- 2023 to 2024 - Portfolio Manager, Overlay Services, Russell Investments
- 2024 to Present - Portfolio Manager, Overlay Services, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Thomas.

### OTHER BUSINESS ACTIVITIES:

Thomas does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Brian Causey is responsible for the supervision and oversight of Thomas. Brian Causey is a Director, Customized Portfolio Solutions, Overlay Portfolio Management for Russell Investments and is responsible for helping to ensure Thomas adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Brian Causey can be reached at 206.505.7877.

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## Keith Brakebill, CFA

Director, Senior Portfolio Manager – Private Credit  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Keith Brakebill and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Keith Brakebill is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1983

#### Education and Designations:

- B.A., College Scholars, University of Tennessee
- M.A., International Policy Studies, Stanford University
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to Present - Director, Senior Portfolio Manager, Private Credit, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Keith.

### OTHER BUSINESS ACTIVITIES:

Keith does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Victor Leverett is responsible for the supervision and oversight of Keith. Victor Leverett is a Managing Director, Head of Alternative Investments for Russell Investments and is responsible for helping to ensure Keith adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Victor Leverett can be reached at 206.505.7877.

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## Brian Causey, CFA

Director, Customized Portfolio Solutions, Overlay Portfolio Management  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Brian Causey and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Brian Causey is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1977

#### Education and Designations:

- A.A., Bellevue Community College
- B.A., Finance, Western Washington University
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*
- Chartered Financial Analyst® (CFA)†

#### Business Background (past five years):

- 2020 to Present - Director, Overlay Portfolio Management, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Brian.

### OTHER BUSINESS ACTIVITIES:

Brian is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Kelly Mainelli is responsible for the supervision and oversight of Brian. Kelly Mainelli is a Managing Director, Co-Head of Customized Portfolio Solutions for Russell Investments and is responsible for helping to ensure Brian adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Kelly Mainelli can be reached at 206.505.7877.

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\*To become registered, securities professionals are required to pass qualifying exams administered by the Financial Industry Regulatory Authority ("FINRA") to demonstrate competence in their particular securities activities.

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## Lukas Diesing, CFA

Senior Portfolio Manager, Customized Portfolio Solutions, Transition Management  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Lukas Diesing and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Lukas Diesing is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1991

#### Education and Designations:

- B.A., Business and Leadership, University of Puget Sound
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*
- Chartered Financial Analyst® (CFA)†

#### Business Background (past five years):

- 2020 to 2023 - Portfolio Manager, Russell Investments
- 2020 to Present - Senior Portfolio Manager, Transition Management, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Lukas.

### OTHER BUSINESS ACTIVITIES:

Lukas is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Chris Peirce is responsible for the supervision and oversight of Lukas. Chris Peirce is a Senior Portfolio Manager, Transition Management for Russell Investments and is responsible for helping to ensure Lukas adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Chris Peirce can be reached at 206.505.7877.

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## Jon Eggins, CFA

Managing Director, Head of Portfolio Management  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jon Eggins and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Jon Eggins is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1981

#### **Education and Designations:**

- Bachelor's of Commerce, Economics and Finance, University of New South Wales, Sydney, Australia
- Chartered Financial Analyst® (CFA)\*

#### **Business Background (past five years):**

- 2020 to 2022 - Senior Director, Head of Global Equity, Russell Investments
- 2022 to Present - Managing Director, Head of Portfolio Management, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Jon.

### **OTHER BUSINESS ACTIVITIES:**

Jon does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Kate El-Hillow is responsible for the supervision and oversight of Jon. Kate El-Hillow is a President and Chief Investment Officer for Russell Investments and is responsible for helping to ensure Jon adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Kate El-Hillow can be reached at 206.505.7877.

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## Bruce Eidelson

Senior Director, Listed Real Assets  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Bruce Eidelson and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Bruce Eidelson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1956

#### **Education and Designations:**

- B.A., University of California, Los Angeles
- M.B.A., University of California, Los Angeles
- M.S., Massachusetts Institute of Technology

#### **Business Background (past five years):**

- 2020 to 2023 - Director, Senior Portfolio Manager, Russell Investments
- 2023 to Present - Senior Director, Listed Real Assets, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Bruce.

### **OTHER BUSINESS ACTIVITIES:**

Bruce does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Victor Leverett is responsible for the supervision and oversight of Bruce. Victor Leverett is a Managing Director, Head of Alternative Investments for Russell Investments and is responsible for helping to ensure Bruce adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Victor Leverett can be reached at 206.505.7877.

## Kate El-Hillow

President and Chief Investment Officer  
Investment Division  
575 Fifth Avenue Suite 35B  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Kate El-Hillow and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Kate El-Hillow is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1974

#### Education and Designations:

- B.S., Accounting, Boston College, Carroll School of Management
- National Commodities Futures Exam (Series 3)\*
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Principal (Series 24)\*
- General Securities Representative (Series 7)\*
- Securities Trader (Series 57)\*
- Securities Trader Principal (Series 57)\*
- The Fundamentals of Sustainability Accounting (FSA) Credential†

#### Business Background (past five years):

- 2020 to 2021 - Deputy Chief Investment Officer, Goldman Sachs
- 2021 to 2022 – Global Chief Investment Officer, Russell Investments
- 2022 to Present – President and Global Chief Investment Officer, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Kate.

### OTHER BUSINESS ACTIVITIES:

Kate is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. Kate is also a registered Associated Person of Russell Investments Capital, LLC and Russell Investment Management, LLC, affiliated commodity pool operators registered with the Commodity Futures Trading Commission ("CFTC"). See the Brochure for more information on these affiliated businesses.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Zach Buchwald is responsible for the supervision and oversight of Kate. Zach Buchwald is a Chairman & CEO for Russell Investments and is responsible for helping to ensure Kate adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Zach Buchwald can be reached at 206.505.7877.

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## Cedric Fan, CFA

Senior Director, Head of Hedge Funds  
Customized Portfolio Solutions  
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New York, NY 10017  
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This Brochure Supplement provides information about Cedric Fan and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Cedric Fan is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1974

#### **Education and Designations:**

- B.S., Economics, University of Wisconsin-Madison
- M.A., Economics, New York University
- Chartered Financial Analyst® (CFA)\*

#### **Business Background (past five years):**

- 2020 to Present - Senior Director, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Cedric.

### **OTHER BUSINESS ACTIVITIES:**

Cedric does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

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### **SUPERVISION:**

Kate El-Hillow is responsible for the supervision and oversight of Cedric. Kate El-Hillow is a President and Chief Investment Officer for Russell Investments and is responsible for helping to ensure Cedric adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Kate El-Hillow can be reached at 206.505.7877.

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\*The Chartered Financial Analyst® (CFA) charter is a globally recognized designation offered by the CFA Institute to investment professionals who have completed the CFA® Program and work experience requirements. To qualify for the CFA Program, candidates must have a bachelor's (or equivalent) degree or 4,000 hours of professional work experience and/or higher education. To earn the CFA charter, candidates must, within three years, pass three exams, complete 4,000 hours of professional work experience in the investment decision-making process, and join the CFA Institute as a regular member. CFA charterholders are required to adhere to the CFA Institute's code of ethics and professional conduct standards.

## Rino Faustini

Senior Portfolio Manager, Customized Portfolio Solutions, Equity  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Rino Faustini and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Rino Faustini is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1981

#### **Education and Designations:**

- B.S., Business Administration, Wayne State University
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*

#### **Business Background (past five years):**

- 2020 to Present – Senior Portfolio Manager, Russell Investments
- 2017 to 2020 – Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Rino.

### **OTHER BUSINESS ACTIVITIES:**

Rino is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Nick Zylkowski is responsible for the supervision and oversight of Rino. Nick Zylkowski is a Managing Director, Co-Head of Customized Portfolio Solutions for Russell Investments and is responsible for helping to ensure Rino adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Nick Zylkowski can be reached at 206.505.7877.

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\*To become registered, securities professionals are required to pass qualifying exams administered by the Financial Industry Regulatory Authority ("FINRA") to demonstrate competence in their particular securities activities.

## Jeremy Field

Senior Portfolio Manager, Customized Portfolio Solutions, Equity  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jeremy Field and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Jeremy Field is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1981

#### **Education and Designations:**

- B.A., Bible, Theology, and Pastoral Ministries, Multnomah Bible College
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*

#### **Business Background (past five years):**

- 2020 to 2022 - Portfolio Manager, Russell Investments
- 2022 to Present - Senior Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Jeremy.

### **OTHER BUSINESS ACTIVITIES:**

Jeremy is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Austin Kishi is responsible for the supervision and oversight of Jeremy. Austin Kishi is a Senior Portfolio Manager, Head of EPI, Customized Portfolio Solutions, Equity for Russell Investments and is responsible for helping to ensure Jeremy adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Austin Kishi can be reached at 206.505.7877.

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## Gerard Fitzpatrick, CAIA

Managing Director, Global Head of Fixed Income Portfolio Management  
Customized Portfolio Solutions  
Rex House, 10 Regent Street  
London SW1Y 4PE  
44.20.7024.6000



This Brochure Supplement provides information about Gerard Fitzpatrick and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Gerard Fitzpatrick is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1972

#### Education and Designations:

- B.B.S., Finance, Trinity College Dublin
- M.A., Finance, Trinity College Dublin
- The Chartered Alternative Investment Analyst (CAIA)\*, Financial Risk Manager (FRM) Certification, Global Association of Risk Professionals†, Associate of the Institute of Financial Services (formerly Chartered Institute of Bankers, UK)††

#### Business Background (past five years):

- 2020 to Present - Managing Director, Global Head of Fixed Income Portfolio Management, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Gerard.

### OTHER BUSINESS ACTIVITIES:

Gerard does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Jon Eggins is responsible for the supervision and oversight of Gerard. Jon Eggins is a Managing Director, Head of Portfolio Management for Russell Investments and is responsible for helping to ensure Gerard adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jon Eggins can be reached at 206.505.7877.

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\*The Chartered Alternative Investment Analyst (CAIA) Charter is a globally recognized designation offered by the CAIA Association to establish an educational standard for individuals that specialize in the area of alternative investments (such as hedge funds, venture capital, private equity, and real estate investment). To earn the charter, candidates must have a U.S. bachelor's degree and at least one year of professional experience in the finance industry, or four years of professional experience in the financial industry, and must pass two exams that include topics ranging from qualitative analysis, trading theories of alternative investments, to indexation and benchmarking.

†The Financial Risk Manager (FRM) designation is an international professional certification offered by the Global Association of Risk Professionals (GARP). Individuals must pass two four-hour exams and have at least two years of relevant work experience.

††The Chartered Banker Professional Standards Board seeks to rebuild banking on a solid foundation of ethical professionalism. The Associate Chartered Banker Diploma enhances existing skills and knowledge to develop and demonstrate in depth, the core technical knowledge and key practical skills that a professional and ethical banker requires. The curriculum includes substantial coverage of technology, leadership, and change, in addition to core banking knowledge. Each unit is assessed by an assignment to demonstrate application of learning at work and ensures that individuals have the knowledge to meet current and emerging regulatory requirements for the demonstration of high professional standards.

## Dan Fletcher, CFA

Portfolio Manager  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Dan Fletcher and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Dan Fletcher is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1988

#### **Education and Designations:**

- B.A., Economics and Psychology, Bucknell University
- Chartered Financial Analyst® (CFA)\*

#### **Business Background (past five years):**

- 2020 to 2022 - Vice President, iCapital
- 2022 to Present - Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Dan.

### **OTHER BUSINESS ACTIVITIES:**

Dan does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Sam Foster is responsible for the supervision and oversight of Dan. Sam Foster is a Managing Director, Senior Portfolio Manager - Private Markets for Russell Investments and is responsible for helping to ensure Dan adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Sam Foster can be reached at 206.505.7877.

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## Adrianna Giesey

Portfolio Manager  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Adrianna Giesey and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Adrianna Giesey is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1981

#### **Education and Designations:**

- B.S., Finance, Florida State University

#### **Business Background (past five years):**

- 2020 to 2022 - Senior Research Analyst, Russell Investments
- 2022 to Present - Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Adrianna.

### **OTHER BUSINESS ACTIVITIES:**

Adrianna does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Bruce Eidelson is responsible for the supervision and oversight of Adrianna. Bruce Eidelson is a Senior Director, Listed Real Assets for Russell Investments and is responsible for helping to ensure Adrianna adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Bruce Eidelson can be reached at 206.505.7877.

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## Nick Haupt, CFA

Portfolio Manager, Equity  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Nick Haupt and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Nick Haupt is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1980

#### Education and Designations:

- B.A., Business & Finance, University of Washington
- M.S., Data Science & Predictive Analytics, Northwestern University
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to 2021 - Associate Portfolio Manager, Russell Investments
- 2021 to 2024 - Portfolio Manager, Russell Investments
- 2024 to Present - Senior Portfolio Manager, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Nick.

### OTHER BUSINESS ACTIVITIES:

Nick does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Megan Roach is responsible for the supervision and oversight of Nick. Megan Roach is a Senior Director, Co-Head of Equity Portfolio Management for Russell Investments and is responsible for helping to ensure Nick adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Megan Roach can be reached at 206.505.7877.

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## Marc Hewitt

Senior Portfolio Manager, Customized Portfolio Solutions, Equity  
Portfolio Management  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Marc Hewitt and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Marc Hewitt is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1977

#### **Education and Designations:**

- B.A., Finance (minor in Economics), Western Washington University
- M.B.A., University of Pittsburgh
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*

#### **Business Background (past five years):**

- 2020 to Present - Senior Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Marc.

### **OTHER BUSINESS ACTIVITIES:**

Marc is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Austin Kishi is responsible for the supervision and oversight of Marc. Austin Kishi is a Senior Portfolio Manager, Head of EPI, Customized Portfolio Solutions, Equity for Russell Investments and is responsible for helping to ensure Marc adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Austin Kishi can be reached at 206.505.7877.

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## Josh Houchin, CFA

Head of Portfolio Implementation, North America  
Portfolio Management  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Josh Houchin and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Josh Houchin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1982

#### Education and Designations:

- B.S., Embry-Riddle Aeronautical University
- M.B.A., Boise State University
- General Securities Representative (Series 7)\*
- General Securities Principal (Series 24)\*
- Uniform Securities State Law Exam (Series 63)\*
- Chartered Financial Analyst® (CFA)†

#### Business Background (past five years):

- 2020 to 2022 - Senior Portfolio Manager, Russell Investments
- 2022 to Present - Head of Portfolio Implementation, North America, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Josh.

### OTHER BUSINESS ACTIVITIES:

Josh is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Jon Eggins is responsible for the supervision and oversight of Josh. Jon Eggins is a Managing Director, Head of Portfolio Management for Russell Investments and is responsible for helping to ensure Josh adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jon Eggins can be reached at 206.505.7877.

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## Jim Jornlin, CFA

Senior Portfolio Manager, Equity  
Portfolio Management  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jim Jornlin and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Jim Jornlin is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1961

#### Education and Designations:

- B.A., Washington State University
- M.B.A., University of Chicago, Booth School of Business
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*
- Chartered Financial Analyst® (CFA)†

#### Business Background (past five years):

- 2020 to Present - Senior Portfolio Manager, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Jim.

### OTHER BUSINESS ACTIVITIES:

Jim is a registered representative of Russell Investments Financial Services and Russell Investments Implementation Services, LLC, affiliated broker-dealers registered with the SEC. See the Brochure for more information on these affiliated businesses. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Megan Roach is responsible for the supervision and oversight of Jim. Megan Roach is a Senior Director, Co-Head of Equity Portfolio Management for Russell Investments and is responsible for helping to ensure Jim adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Megan Roach can be reached at 206.505.7877.

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## Dylan Kelly, CFA, CAIA

Portfolio Manager, Customized Portfolio Solutions, Overlay Services  
Portfolio Management  
1301 Second Ave  
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206.505.7877



This Brochure Supplement provides information about Dylan Kelly and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Dylan Kelly is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1984

#### Education and Designations:

- B.A., Business Administration, California State University, Fullerton
- M.B.A., Finance, University of Nevada, Las Vegas
- Chartered Financial Analyst® (CFA)\*, Chartered Alternative Investment Analyst (CAIA)†

#### Business Background (past five years):

- 2020 to 2022 - Associate Portfolio Manager, Overlay Services, Russell Investments
- 2022 to Present - Portfolio Manager, Overlay Services, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Dylan.

### OTHER BUSINESS ACTIVITIES:

Dylan does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Brian Causey is responsible for the supervision and oversight of Dylan. Brian Causey is a Director, Customized Portfolio Solutions, Overlay Portfolio Management for Russell Investments and is responsible for helping to ensure Dylan adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Brian Causey can be reached at 206.505.7877.

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## Austin Kishi

Senior Portfolio Manager, Head of EPI, Customized Portfolio Solutions, Equity  
Portfolio Management  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Austin Kishi and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Austin Kishi is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1984

#### **Education and Designations:**

- B.A., Business Administration (Finance), Western Washington University
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*

#### **Business Background (past five years):**

- 2020 to 2021 - Senior Portfolio Manager, Russell Investments
- 2021 to Present - Senior Portfolio Manager, Head of EPI, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Austin.

### **OTHER BUSINESS ACTIVITIES:**

Austin is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Nick Zylkowski is responsible for the supervision and oversight of Austin. Nick Zylkowski is a Managing Director, Co-Head of Customized Portfolio Solutions for Russell Investments and is responsible for helping to ensure Austin adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Nick Zylkowski can be reached at 206.505.7877.

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\*To become registered, securities professionals are required to pass qualifying exams administered by the Financial Industry Regulatory Authority ("FINRA") to demonstrate competence in their particular securities activities.

## Andreas Koester, CFA

Portfolio Manager, Equity  
Alternatives  
Rex House, 10 Regent Street  
London SW1Y 4PE  
44.20.7024.6000



This Brochure Supplement provides information about Andreas Koester and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Andreas Koester is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1982

#### Education and Designations:

- B.A., Business Management, Kingston University
- M.Sc., Management, London School of Economics
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to 2022 - Associate Portfolio Manager, Russell Investments
- 2022 To Present - Portfolio Manager, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Andreas.

### OTHER BUSINESS ACTIVITIES:

Andreas does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

William Pearce is responsible for the supervision and oversight of Andreas. William Pearce is a Senior Director, Co-Head of Equity Portfolio Management for Russell Investments and is responsible for helping to ensure Andreas adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. William Pearce can be reached at 44.20.7024.6000.

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\*The Chartered Financial Analyst® (CFA) charter is a globally recognized designation offered by the CFA Institute to investment professionals who have completed the CFA® Program and work experience requirements. To qualify for the CFA Program, candidates must have a bachelor's (or equivalent) degree or 4,000 hours of professional work experience and/or higher education. To earn the CFA charter, candidates must, within three years, pass three exams, complete 4,000 hours of professional work experience in the investment decision-making process, and join the CFA Institute as a regular member. CFA charterholders are required to adhere to the CFA Institute's code of ethics and professional conduct standards.



## Marc Larson

Senior Portfolio Manager, Customized Portfolio Solutions, Transition Management  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Marc Larson and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Marc Larson is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1982

#### **Education and Designations:**

- B.S., Business, Economics, Mathematics, University of Puget Sound
- Uniform Securities State Law Exam (Series 63)
- Investment Advisers Law Exam (Series 65)
- General Securities Representative (Series 7)

#### **Business Background (past five years):**

- 2020 to Present - Senior Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Marc.

### **OTHER BUSINESS ACTIVITIES:**

Marc is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Brett Saunders is responsible for the supervision and oversight of Marc. Brett Saunders is a Senior Portfolio Manager, Customized Portfolio Solutions, Transition Management for Russell Investments and is responsible for helping to ensure Marc adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Brett Saunders can be reached at 206.505.7877.

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\*To become registered, securities professionals are required to pass qualifying exams administered by the Financial Industry Regulatory Authority ("FINRA") to demonstrate competence in their particular securities activities.

## Kelly Mainelli

Managing Director, Co-Head of Customized Portfolio Solutions  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Kelly Mainelli and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Kelly Mainelli is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1967

#### Education and Designations:

- B.A., Finance, Merrimack College
- M.B.A., University of Colorado at Denver
- General Securities Principal (Series 24)
- National Commodities Futures Exam (Series 3)
- Uniform Securities State Law Exam (Series 63)
- General Securities Representative (Series 7)

#### Business Background (past five years):

- 2020 to Present - Managing Director, Customized Portfolio Services, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Kelly.

### OTHER BUSINESS ACTIVITIES:

Kelly is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Kate El-Hillow is responsible for the supervision and oversight of Kelly. Kate El-Hillow is a President and Chief Investment Officer for Russell Investments and is responsible for helping to ensure Kelly adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Kate El-Hillow can be reached at 206.505.7877.

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## Jordan McCall, CFA

Director, Senior Portfolio Manager, Equity  
Alternatives  
1301 Second Ave  
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206.505.7877



This Brochure Supplement provides information about Jordan McCall and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Jordan McCall is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1974

#### Education and Designations:

- B.A., Business Administration, University of Washington
- M.B.A., Seattle University
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to 2023 - Portfolio Manager, Equity, Russell Investments
- 2023 to 2024 - Senior Portfolio Manager, Equity, Russell Investments
- 2024 to Present - Director, Senior Portfolio Manager, Equity, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Jordan.

### OTHER BUSINESS ACTIVITIES:

Jordan does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Megan Roach is responsible for the supervision and oversight of Jordan. Megan Roach is a Senior Director, Co-Head of Equity Portfolio Management for Russell Investments and is responsible for helping to ensure Jordan adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Megan Roach can be reached at 206.505.7877.

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## Jeff Nadeau

Senior Portfolio Manager, Customized Portfolio Solutions, Transition Management  
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1301 Second Ave  
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206.505.7877



This Brochure Supplement provides information about Jeff Nadeau and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Jeff Nadeau is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1974

#### **Education and Designations:**

- B.S., Business, Central Washington University
- Securities Trader (Series 57)
- Uniform Securities State Law Exam (Series 63)
- General Securities Representative (Series 7)

#### **Business Background (past five years):**

- 2020 to Present - Senior Portfolio Manager, Transition Management, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Jeff.

### **OTHER BUSINESS ACTIVITIES:**

Jeff is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Brett Saunders is responsible for the supervision and oversight of Jeff. Brett Saunders is a Senior Portfolio Manager, Customized Portfolio Solutions, Transition Management for Russell Investments and is responsible for helping to ensure Jeff adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Brett Saunders can be reached at 206.505.7877.

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## Yavor Obreshkov, CFA, CAIA

Associate Portfolio Manager†, Equity  
Alternatives  
Rex House, 10 Regent Street  
London SW1Y 4PE  
44.20.7024.6000



This Brochure Supplement provides information about Yavor Obreshkov and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Yavor Obreshkov is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1992

#### Education and Designations:

- B.S., Business Administration and Economics, Goethe University Frankfurt
- M.S., Business Informatics, Goethe University Frankfurt
- Chartered Financial Analyst® (CFA)\*, Chartered Alternative Investment Analyst (CAIA)†, Certification in ESG Investing (CFA Institute)††

#### Business Background (past five years):

- 2020 to 2022 - Portfolio Analyst, Emerging Markets Equity, Russell Investments
- 2022 to 2024 - Senior Portfolio Analyst, Emerging Markets Equity, Russell Investments
- 2024 to Present - Associate Portfolio Manager, Emerging Markets Equity, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Yavor.

### OTHER BUSINESS ACTIVITIES:

Yavor does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Soeren Soerensen is responsible for the supervision and oversight of Yavor. Soeren Soerensen is a Senior Portfolio Manager, Equity for Russell Investments and is responsible for helping to ensure Yavor adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Soeren Soerensen can be reached at 44.20.7024.6000.

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\*The Chartered Financial Analyst® (CFA) charter is a globally recognized designation offered by the CFA Institute to investment professionals who have completed the CFA® Program and work experience requirements. To qualify for the CFA Program, candidates must have a bachelor's (or equivalent) degree or 4,000 hours of professional work experience and/or higher education. To earn the CFA charter, candidates must, within three years, pass three exams, complete 4,000 hours of professional work experience in the investment decision-making process, and join the CFA Institute as a regular member. CFA charterholders are required to adhere to the CFA Institute's code of ethics and professional conduct standards.

†The Chartered Alternative Investment Analyst (CAIA) Charter is a globally recognized designation offered by the CAIA Association to establish an educational standard for individuals that specialize in the area of alternative investments (such as hedge funds, venture capital, private equity, and real estate investment). To earn the charter, candidates must have a U.S. bachelor's degree and at least one year of professional experience in the finance industry, or four years of professional experience in the financial industry, and must pass two exams that include topics ranging from qualitative analysis, trading theories of alternative investments, to indexation and benchmarking.

††The CFA's Certificate in ESG Investing gives examinees the ability to incorporate ESG factors (environmental, social, and governance) into the investment decision-making process—capabilities that are increasingly sought after. After registering, applicants have six months to study the curriculum and complete the exam, with a recommended minimum 100 study hours.

## Ryan Nicholas Parker, CFA

Portfolio Manager, Customized Portfolio Solutions, Equity  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Ryan Nicholas Parker and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Ryan Nicholas Parker is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1983

#### Education and Designations:

- B.A., Brandeis University
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2023 to Present - Portfolio Manager, Customized Portfolio Solutions, Equity, Russell Investments
- 2021 to 2023 - Associate Portfolio Manager, Customized Portfolio Solutions, Equity, Russell Investments
- 2020 to 2021 - Senior Investment Operations Analyst, Russell Investments
- 2020 - Institutional Trading and Rebalancing Analyst, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Ryan Nicholas.

### OTHER BUSINESS ACTIVITIES:

Ryan Nicholas does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Austin Kishi is responsible for the supervision and oversight of Ryan Nicholas. Austin Kishi is a Senior Portfolio Manager, Head of EPI, Customized Portfolio Solutions, Equity for Russell Investments and is responsible for helping to ensure Ryan Nicholas adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Austin Kishi can be reached at 206.505.7877.

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## Chris Peirce, CFA, CPA

Senior Portfolio Manager, Transition Management  
Alternatives  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Chris Peirce and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Chris Peirce is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1974

#### Education and Designations:

- B.B.A., Accounting and Finance, Pacific Lutheran University
- General Securities Principal (Series 24)\*
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*
- Chartered Financial Analyst® (CFA)†, Certified Public Accountant (CPA)††

#### Business Background (past five years):

- 2020 to Present - Senior Portfolio Manager, Transition Management, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Chris.

### OTHER BUSINESS ACTIVITIES:

Chris is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Travis Bagley is responsible for the supervision and oversight of Chris. Travis Bagley is a Director, Head of TM North America for Russell Investments and is responsible for helping to ensure Chris adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Travis Bagley can be reached at 206.505.7877.

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††Certified Public Accountant (CPA) is a U.S. professional designation granted to licensed accounting professionals by the Board of Accountancy for each state. Candidates must have a bachelor's degree or higher and completed 150 semester credit hours from an accredited college or university in business administration, finance, or accounting, pass the Uniform CPA Examination, and complete at least two years of public accounting. CPAs must complete a specific number of continuing education hours each year to keep the designation.

## Brenden Perry

Associate Portfolio Manager, Customized Portfolio Solutions, Overlay Services  
Alternatives  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Brenden Perry and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Brenden Perry is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1996

#### **Education and Designations:**

- B.A., Business Administration, University of Washington

#### **Business Background (past five years):**

- 2020 to 2021 - Portfolio Analyst, Russell Investments
- 2022 to 2023 - Senior Portfolio Analyst, Russell Investments
- 2023 to Present; Associate Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Brenden.

### **OTHER BUSINESS ACTIVITIES:**

Brenden does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Jonathan Baily is responsible for the supervision and oversight of Brenden. Jonathan Baily is a Senior Portfolio Manager, Customized Portfolio Solutions, Overlay Services for Russell Investments and is responsible for helping to ensure Brenden adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jonathan Baily can be reached at 206.505.7877.



## Brian Pringle, CFA

Senior Director, Customized Portfolio Solutions, Fixed Income  
Alternatives  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Brian Pringle and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Brian Pringle is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1976

#### Education and Designations:

- B.S., Wheaton College
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to 2023 - Director, Customized Portfolio Solutions, Russell Investments
- 2023 to Present - Senior Director, Customized Portfolio Solutions, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Brian.

### OTHER BUSINESS ACTIVITIES:

Brian does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Kelly Mainelli is responsible for the supervision and oversight of Brian. Kelly Mainelli is a Managing Director, Co-Head of Customized Portfolio Solutions for Russell Investments and is responsible for helping to ensure Brian adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Kelly Mainelli can be reached at 206.505.7877.

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## Megan Roach, CFA

Senior Director, Co-Head of Equity Portfolio Management  
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1301 Second Ave  
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206.505.7877



This Brochure Supplement provides information about Megan Roach and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Megan Roach is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1980

#### Education and Designations:

- B.A., Finance, Washington State University
- M.B.A., Investment Management, Washington State University
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to 2021 - Senior Portfolio Manager, Russell Investments
- 2021 to Present - Co-Head of Equity Portfolio Management, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Megan.

### OTHER BUSINESS ACTIVITIES:

Megan does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Jon Eggins is responsible for the supervision and oversight of Megan. Jon Eggins is a Managing Director, Head of Portfolio Management for Russell Investments and is responsible for helping to ensure Megan adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jon Eggins can be reached at 206.505.7877.

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\*The Chartered Financial Analyst® (CFA) charter is a globally recognized designation offered by the CFA Institute to investment professionals who have completed the CFA® Program and work experience requirements. To qualify for the CFA Program, candidates must have a bachelor's (or equivalent) degree or 4,000 hours of professional work experience and/or higher education. To earn the CFA charter, candidates must, within three years, pass three exams, complete 4,000 hours of professional work experience in the investment decision-making process, and join the CFA Institute as a regular member. CFA charterholders are required to adhere to the CFA Institute's code of ethics and professional conduct standards.

## Riti Samanta

Senior Director, Portfolio Manager, Fixed Income Solutions  
Alternatives  
575 Fifth Avenue Suite 35B  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Riti Samanta and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Riti Samanta is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1978

#### **Education and Designations:**

- B.A., Reed College
- M.S., Brandeis University
- PhD, Brandeis University

#### **Business Background (past five years):**

- 2020 to 2023 - Senior Portfolio Manager & Lead Strategist, Grantham, Mayo, Van Otterloo (GMO)
- 2023 to 2024 - Senior Director, Systematic Fixed Income Portfolio Manager, Russell Investments
- 2024 to Present - Co-Head, North America Fixed Income, Systematic Fixed Income Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Riti.

### **OTHER BUSINESS ACTIVITIES:**

Riti acts as an investment committee member of Reed College in Oregon. As a Reed College alum on this committee, Riti advises the overall endowment and strategic positioning across asset classes in light of the goals and commitments of the endowment.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Jon Eggins is responsible for the supervision and oversight of Riti. Jon Eggins is a Managing Director, Head of Portfolio Management for Russell Investments and is responsible for helping to ensure Riti adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jon Eggins can be reached at 206.505.7877.

## Philip J Saucier, CFA, CAIA

Portfolio Manager, Customized Portfolio Solutions, Overlay Services  
Alternatives  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Philip J Saucier and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Philip J Saucier is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1988

#### Education and Designations:

- B.A., Business Administration, Pacific Lutheran University
- Chartered Financial Analyst® (CFA)\*, The Chartered Alternative Investment Analyst (CAIA)†

#### Business Background (past five years):

- 2020 to Present - Portfolio Manager, Overlay Services, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Philip J.

### OTHER BUSINESS ACTIVITIES:

Philip J does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Jonathan Baily is responsible for the supervision and oversight of Philip J. Jonathan Baily is a Senior Portfolio Manager, Customized Portfolio Solutions, Overlay Services for Russell Investments and is responsible for helping to ensure Philip J adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Jonathan Baily can be reached at 206.505.7877.

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†The Chartered Alternative Investment Analyst (CAIA) Charter is a globally recognized designation offered by the CAIA Association to establish an educational standard for individuals that specialize in the area of alternative investments (such as hedge funds, venture capital, private equity, and real estate investment). To earn the charter, candidates must have a U.S. bachelor's degree and at least one year of professional experience in the finance industry, or four years of professional experience in the financial industry, and must pass two exams that include topics ranging from qualitative analysis, trading theories of alternative investments, to indexation and benchmarking.

## Brett Saunders

Senior Portfolio Manager, Customized Portfolio Solutions, Transition Management  
Alternatives  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Brett Saunders and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Brett Saunders is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1972

#### **Education and Designations:**

- B.A., Business Administration, Washington State University
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*

#### **Business Background (past five years):**

- 2020 to Present - Senior Portfolio Manager, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Brett.

### **OTHER BUSINESS ACTIVITIES:**

Brett is a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Travis Bagley is responsible for the supervision and oversight of Brett. Travis Bagley is a Director, Head of TM North America for Russell Investments and is responsible for helping to ensure Brett adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Travis Bagley can be reached at 206.505.7877.

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\*To become registered, securities professionals are required to pass qualifying exams administered by the Financial Industry Regulatory Authority ("FINRA") to demonstrate competence in their particular securities activities.

## Christina Shockley

Senior Portfolio Manager, Customized Portfolio Solutions, Overlay Services  
Alternatives  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Christina Shockley and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Christina Shockley is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1985

#### **Education and Designations:**

- B.A., Economics, DePauw University

#### **Business Background (past five years):**

- 2023 to Present – Senior Portfolio Manager, Overlay Services, Russell Investments
- 2020 to 2023 – Portfolio Manager, Overlay Services, Russell Investments

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Christina.

### **OTHER BUSINESS ACTIVITIES:**

Christina does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Brian Causey is responsible for the supervision and oversight of Christina. Brian Causey is a Director, Customized Portfolio Solutions, Overlay Portfolio Management for Russell Investments and is responsible for helping to ensure Christina adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Brian Causey can be reached at 206.505.7877.

## Amneet Singh

Director, Asset Allocation Strategy  
Asset Allocation & Investment Solutions  
100 King Street West, Suite 5715  
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416.362.8411



This Brochure Supplement provides information about Amneet Singh and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Amneet Singh is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1984

#### **Education and Designations:**

- Bachelor of Engineering, Punjab Engineering College
- M.B.A. (PGDM), Indian Institute of Management Bangalore
- Masters Financial Engineering (MFE) – Haas School of Business, University of California, Berkeley

#### **Business Background (past five years):**

- 2020 to 2021 - Asset Allocation Strategist, Russell Investments
- 2021 to 2024 - Senior Asset Allocation Strategist, Russell Investments
- 2024 to Present - Director, Asset Allocation Strategy

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Amneet.

### **OTHER BUSINESS ACTIVITIES:**

Amneet does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

Samuel Pittman is responsible for the supervision and oversight of Amneet. Samuel Pittman is a MD, Co-Head of Strategic Asset Allocation for Russell Investments and is responsible for helping to ensure Amneet adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Samuel Pittman can be reached at 206.505.7877.

## Soeren Soerensen, CFA

Senior Portfolio Manager, Equity  
Alternatives  
Rex House, 10 Regent Street  
London SW1Y 4PE  
44.20.7024.6000



This Brochure Supplement provides information about Soeren Soerensen and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Soeren Soerensen is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:**

**Year of Birth:** 1982

#### **Education and Designations:**

- B.S., Business Administration and Economics, Copenhagen Business School, Denmark
- M.S., Finance and Accounting, Copenhagen Business School, Denmark
- CEMS, Masters in International Management, Vienna University of Economics & Business, Austria
- Chartered Financial Analyst® (CFA)\*

#### **Business Background (past five years):**

- 2020 to 2024 - Portfolio Manager, Emerging Markets Equities, Russell Investments
- 2024 to Present - Senior Portfolio Manager, Emerging Markets Equities, Russell Investments.

### **DISCIPLINARY INFORMATION:**

There are no legal and/or disciplinary events to report for Soeren.

### **OTHER BUSINESS ACTIVITIES:**

Soeren does not have any outside business activities to report.

### **ADDITIONAL COMPENSATION:**

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### **SUPERVISION:**

William Pearce is responsible for the supervision and oversight of Soeren. William Pearce is a Senior Director, Co-Head of Equity Portfolio Management for Russell Investments and is responsible for helping to ensure Soeren adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. William Pearce can be reached at 44.20.7024.6000.

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## Andrew Zenonos, CFA

Portfolio Manager, Customized Portfolio Solutions, Asia Pacific  
Customized Portfolio Solutions  
Level 28, 85 Castlereagh Street  
Sydney NSW 2000  
206.505.7877



This Brochure Supplement provides information about Andrew Zenonos and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Andrew Zenonos is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1989

#### Education and Designations:

- Bachelor of Commerce (Finance), University of Queensland
- Chartered Financial Analyst® (CFA)\*

#### Business Background (past five years):

- 2020 to Present - Portfolio Manager, Sydney, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Andrew.

### OTHER BUSINESS ACTIVITIES:

Andrew does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Alistair Martyres is responsible for the supervision and oversight of Andrew. Alistair Martyres is a Director, Customized Portfolio Solutions, Asia Pacific for Russell Investments and is responsible for helping to ensure Andrew adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Alistair Martyres can be reached at 206.505.7877.

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## Nikki Zhou, CFA, FSA, CAIA

Associate Portfolio Manager, Multi Asset  
Customized Portfolio Solutions  
575 Fifth Avenue Suite 35B  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Nikki Zhou and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Nikki Zhou is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1992

#### Education and Designations:

- B.S., Finance and Mathematics, Renmin University of China
- M.S., Financial Engineering, New York University
- Chartered Financial Analyst® (CFA)\*, The Fundamentals of Sustainability Accounting (FSA) Credential†, The Chartered Alternative Investment Analyst (CAIA)††

#### Business Background (past five years):

- 2024 to Present - Associate Portfolio Manager, Multi-Asset Solutions, Russell Investments
- 2022 to 2024 - Senior Portfolio Analyst, Multi-Asset Solutions, Russell Investments
- 2020 to 2022 - Portfolio Analyst, Multi-Asset Solutions, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Nikki.

### OTHER BUSINESS ACTIVITIES:

Nikki does not have any outside business activities to report.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Rob Balkema is responsible for the supervision and oversight of Nikki. Rob Balkema is a Senior Director, Head of Multi-Asset, North America for Russell Investments and is responsible for helping to ensure Nikki adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Rob Balkema can be reached at 206.505.7877.

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†The Fundamentals of Sustainability Accounting (FSA) Credential is offered by the Sustainability Accounting Standards Board (SASB) and is designed to equip professionals with the knowledge and skills to understand the link between financially material sustainability information and a company's ability to drive enterprise value. The FSA Credential combines two exams to assess professional expertise in the materiality of sustainability information for corporate performance and investment analysis. Each exam requires an average of 30-50 hours of study.

††The Chartered Alternative Investment Analyst (CAIA) Charter is a globally recognized designation offered by the CAIA Association to establish an educational standard for individuals that specialize in the area of alternative investments (such as hedge funds, venture capital, private equity, and real estate investment). To earn the charter, candidates must have a U.S. bachelor's degree and at least one year of professional experience in the finance industry, or four years of professional experience in the financial industry, and must pass two exams that include topics ranging from qualitative analysis, trading theories of alternative investments, to indexation and benchmarking.

## Nick Zylkowski, CFA

Managing Director, Co-Head of Customized Portfolio Solutions  
Customized Portfolio Solutions  
1301 Second Ave  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Nick Zylkowski and supplements the RIIS Brochure. You should have received a copy of that Brochure. Please contact 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIIS Brochure, or if you have any questions about the contents of this Brochure Supplement. Additional information about Nick Zylkowski is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE:

**Year of Birth:** 1985

#### Education and Designations:

- B.A., Economics, Pacific Lutheran University
- Uniform Securities State Law Exam (Series 63)\*
- General Securities Representative (Series 7)\*
- Chartered Financial Analyst® (CFA)†

#### Business Background (past five years):

- 2020 to 2024 - Senior Director, Russell Investments
- 2024 - Present - Managing Director, Russell Investments

### DISCIPLINARY INFORMATION:

There are no legal and/or disciplinary events to report for Nick.

### OTHER BUSINESS ACTIVITIES:

Nick acts as the Treasurer of the Board of Washington Bikes, a non-profit community organization with no affiliation with the investment industry. Washington Bikes advocates for a bicycle-friendly state, works to increase funding for bicycle infrastructure and pass legislation to improve access and safety, coordinates with state agencies on implementation of laws and regulations, provides tools for local advocates to improve their communities, and seeks to make bicycling accessible to everyone. Nick is also on the Board of Directors and Finance Committee for Cascade Bicycle Club 7787. Nick is also a registered representative of Russell Investments Implementation Services, LLC, an affiliated broker-dealer registered with the SEC. See the Brochure for more information on this affiliated business.

### ADDITIONAL COMPENSATION:

The remuneration of Russell Investments' Supervised Persons is comprised of base salary (fixed pay) and discretionary incentive (variable pay). Base salary is specific to the role and determined by market pay ranges and internal budget. Discretionary incentive is an annual bonus awarded based on individual, firm, and business unit performance. Additionally, Russell Investments may also provide equity awards to Supervised Persons in senior positions. Remuneration is not directly affected by an increase in fund or client assets under management.

### SUPERVISION:

Kelly Mainelli is responsible for the supervision and oversight of Nick. Kelly Mainelli is a Managing Director, Co-Head of Customized Portfolio Solutions for Russell Investments and is responsible for helping to ensure Nick adheres to policies and procedures designed to assure that advice is consistent with our clients' agreed upon investment objectives and guidelines and the firm's fiduciary obligations. Kelly Mainelli can be reached at 206.505.7877.

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