

# RUSSELL INVESTMENT MANAGEMENT, LLC



FORM ADV PART 2B BROCHURE SUPPLEMENT

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

March 31, 2026

This Brochure Supplement provides information about supervised persons providing investment advisory services to Russell Investment Management, LLC ("RIM") clients and supplements the RIM 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).

RIM 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.

Additional Information about RIM is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## Rob Balkema, CFA

Senior Director, Head of Multi-Asset, North America  
Investment Division  
575 Fifth Avenue, 35th Floor  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Rob Balkema and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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, Co-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 experience and/or higher education. Candidates must pass three exams, complete 4,000 hours of professional experience in the investment decision-making process, and join the CFA Institute as a regular member.

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## Olga Bezrokov, CFA, FRM

Director, Senior Portfolio Manager, Multi-Asset  
Investment Division  
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 RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1986

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

- Bachelor of Commerce, Finance, McGill University
- Chartered Financial Analyst® (CFA)\*
- Financial Risk Manager (FRM)†

#### **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
- 2025 to Present - Director, Senior Portfolio Manager, Multi-Asset, 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 Financial Risk Manager (FRM) designation is awarded by the Global Association of Risk Professionals (GARP) and certifies that an individual has the expertise to identify, assess, and manage financial risks across various domains. Candidates must pass two exams and demonstrate at least two years of relevant work experience.

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## Keith Brakebill, CFA

Senior Director, Co-Head of Global Fixed Income  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Keith Brakebill and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 2024 - Director, Senior Portfolio Manager, Private Credit, Russell Investments
- 2025 to Present - Senior Director, Co-Head of Global Fixed Income, 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:**

Jon Eggins is responsible for the supervision and oversight of Keith. Jon Eggins is a Managing Director, Co-Head of Portfolio Management 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. Jon Eggins can be reached at 206.505.7877.

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## Binh Dang

Senior Director, Head of Client Platform Solutions  
North America Institutional  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Binh Dang and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1979

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

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

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

- 2020 to 2022 - Director, Investment Division Solutions, Russell Investments
- 2022 to Present - Senior Director, Head of Client Platform Solutions, Russell Investments

### **DISCIPLINARY INFORMATION:**

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

### **OTHER BUSINESS ACTIVITIES:**

Binh 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:**

Shelly Heier is responsible for the supervision and oversight of Binh. Shelly Heier is a Managing Director, Global Head of Institutional Client Service for Russell Investments and is responsible for helping to ensure Binh 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. Shelly Heier can be reached at 206.505.7877.

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## Jon Eggins, CFA

Managing Director, Co-Head of Portfolio Management  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



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

**Year of Birth:** 1981

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

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

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

- 2020 to 2022 - Senior Director, Head of Global Equity, Russell Investments
- 2022 to 2025 - Managing Director, Head of Portfolio Management, Russell Investments
- 2025 to Present - Managing Director, Co-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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## Kate El-Hillow

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



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### **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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\*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.

†The Fundamentals of Sustainability Accounting (FSA) Credential, offered by the Sustainability Accounting Standards Board (SASB), equips professionals to understand how sustainability impacts enterprise value. It consists of two exams that test knowledge of the materiality of sustainability information in corporate performance and investment analysis, each requiring about 30-50 hours of study.

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## Cedric Fan, CFA

Senior Director, Co-Head Total Solutions  
Investment Division  
575 Fifth Avenue, 35th Floor  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Cedric Fan and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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:**

Jon Eggins is responsible for the supervision and oversight of Cedric. Jon Eggins is a Managing Director, Co-Head of Portfolio Management 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. Jon Eggins can be reached at 206.505.7877.

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## Rino Faustini

Senior Portfolio Manager, Customized Portfolio Solutions, Equity  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Rino Faustini and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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

### **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.

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## Jeremy Field

Senior Portfolio Manager, Customized Portfolio Solutions, Equity  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jeremy Field and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 Director, 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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## Samantha Foster, CQF

Managing Director, Senior Portfolio Manager, Private Markets  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Samantha Foster and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1975

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

- B.S., California Institute of Technology
- M.B.A., Stanford Graduate School of Business
- The Certification in Quantitative Finance\*

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

- 2020 to 2022 - Managing Director, University of Southern California
- 2022 to Present - Managing Director, Russell Investments

### **DISCIPLINARY INFORMATION:**

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

### **OTHER BUSINESS ACTIVITIES:**

Samantha sits on the programming committee of Women in Institutional Investment Network (WIIIN), a non-profit organization intended to broaden women's network connections in institution investments. Samantha is also a North America committee member of the Standards Board for Alternative Investments (SBAI), a non-profit organization focused on common standards within alternative investments.

### **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:**

Vic Leverett is responsible for the supervision and oversight of Samantha. Vic Leverett is a Managing Director, Co-Head of Portfolio Management for Russell Investments and is responsible for helping to ensure Samantha 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. Vic Leverett can be reached at 206.505.7877.

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\*The Certification in Quantitative Finance (CQF) is a six-month training program in quant finance and machine learning. The certification requires applicants to attend weekly lectures, and provides the option of completing optional practice exercises in implementing models. The exam is open-book and allows applicants to apply their knowledge of quantitative analysis and other topics. The typical time commitment for applicants is 5-10 hours per week in addition to lectures.

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## Adrianna Giesey

Director, Senior Portfolio Manager, Real Assets  
Investment Division  
401 Union Street, 18th Floor  
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This Brochure Supplement provides information about Adrianna Giesey and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 2024 - Portfolio Manager, Russell Investments
- 2024 to Present - Director, Senior Portfolio Manager, Real Assets, 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:**

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### **SUPERVISION:**

Tim Ryan is responsible for the supervision and oversight of Adrianna. Tim Ryan is a Managing Director, Senior Portfolio Manager, 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. Tim Ryan can be reached at 206.505.7877.

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## Nick Haupt, CFA

Senior Portfolio Manager, Equity  
Investment Division  
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### **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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\*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 experience and/or higher education. Candidates must pass three exams, complete 4,000 hours of professional experience in the investment decision-making process, and join the CFA Institute as a regular member.

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## Marc Hewitt

Senior Portfolio Manager, Customized Portfolio Solutions, Equity  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Marc Hewitt and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 Director, 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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\*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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## Josh Houchin, CFA

Senior Portfolio Manager, Transition Management  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Josh Houchin and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 2024 - Head of Portfolio Implementation, North America, Russell Investments
- 2024 to Present - Senior Portfolio Manager, Transition Management, 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:**

Travis Bagley is responsible for the supervision and oversight of Josh. Travis Bagley is a Senior Director, Global Head of Transition 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. Travis Bagley can be reached at 206.505.7877.

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## Jim Jornlin, CFA

Senior Portfolio Manager, Equity  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jim Jornlin and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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)\*
- 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 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:**

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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## Austin Kishi

Director, Customized Portfolio Solutions, Equity  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Austin Kishi and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 66)\*
- General Securities Representative (Series 7)\*

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

- 2020 to 2021 - Senior Portfolio Manager, Russell Investments
- 2021 to 2025 - Senior Portfolio Manager, Head of EPI, Russell Investments
- 2025 to Present - Director, Customized Portfolio Solutions, Equity, 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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## Andreas Koester, CFA

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



This Brochure Supplement provides information about Andreas Koester and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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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## Victor Leverett

Managing Director, Co-Head of Portfolio Management  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Victor Leverett and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1965

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

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

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

- 2020 to Present - Managing Director, Russell Investments

### **DISCIPLINARY INFORMATION:**

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

### **OTHER BUSINESS ACTIVITIES:**

Victor 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 Victor. Kate El-Hillow is a President and Chief Investment Officer for Russell Investments and is responsible for helping to ensure Victor 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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## Kelly Mainelli

Chief Administrative Officer & Co-Head of Customized Portfolio Solutions  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Kelly Mainelli and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1967

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

- B.S., Finance, Merrimack College
- M.B.A., Finance, University of Colorado
- 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 2025 - Managing Director, Customized Portfolio Services, Russell Investments
- 2025 to Present - Chief Chief Administrative Officer & Co-Head of Customized Portfolio Solutions, 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:**

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### **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  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Jordan McCall and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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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## Patrick Nikodem

Director, Senior Portfolio Manager, Real Assets  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Patrick Nikodem and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1986

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

- B.S., The Wharton School, University of Pennsylvania
- B.A., International Studies and German, University of Pennsylvania

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

- 2020 to 2021 - Portfolio Manager, Russell Investments
- 2021 to 2023 - Senior Portfolio Manager, Russell Investments
- 2023 to 2025 - Director, Listed Real Assets, Russell Investments
- 2025 to Present - Director, Senior Portfolio Manager, Real Assets, Russell Investments

### **DISCIPLINARY INFORMATION:**

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

### **OTHER BUSINESS ACTIVITIES:**

Patrick 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:**

Tim Ryan is responsible for the supervision and oversight of Patrick. Tim Ryan is a Managing Director, Senior Portfolio Manager, Real Assets for Russell Investments and is responsible for helping to ensure Patrick 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. Tim Ryan can be reached at 206.505.7877.

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## Yavor Obreshkov, CFA, CAIA

Associate Portfolio Manager, Equity  
Investment Division  
Rex House, 10 Regent Street  
London SW1Y 4PE  
44.20.7024.6000



This Brochure Supplement provides information about Yavor Obreshkov and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### 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, 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 Director, 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 Alternative Investment Analyst (CAIA) Charter, offered by the CAIA Association, is a globally recognized designation for professionals specializing in alternative investments (e.g., hedge funds, private equity, real estate). Candidates need a bachelor's degree plus one year of finance experience or four years of finance experience, and must pass two exams covering qualitative analysis, trading theories, indexation, and benchmarking.

‡The CFA Institute's Certificate in ESG Investing is designed to incorporate ESG factors (environmental, social, and governance) into the investment decision-making process. Candidates must complete an exam, with a recommended minimum 100 study hours.

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## Ryan Parker, CFA

Portfolio Manager, Customized Portfolio Solutions, Equity  
Investment Division  
401 Union Street, 18th Floor  
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206.505.7877



This Brochure Supplement provides information about Ryan Parker and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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):**

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

### **DISCIPLINARY INFORMATION:**

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

### **OTHER BUSINESS ACTIVITIES:**

Ryan 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. Austin Kishi is a Director, Customized Portfolio Solutions, Equity for Russell Investments and is responsible for helping to ensure Ryan 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  
Investment Division  
401 Union Street, 18th Floor  
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206.505.7877



This Brochure Supplement provides information about Chris Peirce and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1974

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

- B.B.A., Accounting and Finance, Pacific Lutheran University
- General Securities Representative (Series 7)\*
- General Securities Principal (Series 24)\*
- Investment Adviser Representative (Series 66)\*
- 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 Senior Director, Global Head of Transition Management 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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\*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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‡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.

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## Samuel Pittman

Managing Director, Head of Strategic Asset Allocation  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Samuel Pittman and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1972

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

- B.S., Mathematics, University of Washington
- M.S., Applied Mathematics, University of Washington; M.S., Biometrics, University of Washington
- Ph.D., Operations Research, University of Washington

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

- 2020 to 2023 - Managing Director, Head of Asset Allocation and Investment Solutions, Russell Investments
- 2023 to 2025 - Managing Director, Co-Head of Strategic Asset Allocation, Russell Investments
- 2025 to Present - Managing Director, Head of Strategic Asset Allocation, Russell Investments

### **DISCIPLINARY INFORMATION:**

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

### **OTHER BUSINESS ACTIVITIES:**

Samuel 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 Samuel. Kate El-Hillow is a President and Chief Investment Officer for Russell Investments and is responsible for helping to ensure Samuel 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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## Brian Pringle, CFA

Senior Director, Head of North America Fixed Income  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Brian Pringle and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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 2025 - Senior Director, Customized Portfolio Solutions, Russell Investments
- 2025 to Present - Senior Director, Head of North America Fixed Income, 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:**

Riti Samanta is responsible for the supervision and oversight of Brian. Riti Samanta is a Senior Director, Co-Head of Global Fixed Income 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. Riti Samanta can be reached at 206.505.7877.

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## Megan Roach, CFA

Senior Director, Co-Head of Equity Portfolio Management  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Megan Roach and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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, Co-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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## Riti Samanta

Senior Director, Co-Head of Global Fixed Income  
Investment Division  
575 Fifth Avenue, 35th Floor  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Riti Samanta and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1978

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

- B.A., Economics and Mathematics, Reed College
- M.Sc., Mathematical Finance, Brandeis University
- Ph.D., International Economics and Finance, 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 2025 - Senior Director, Co-Head, North America Fixed Income, Systematic Fixed Income Portfolio Manager, Russell Investments
- 2025 to Present - Senior Director, Co-Head of Global Fixed Income, 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, Co-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.

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## Amneet Singh

Director, Asset Allocation Strategy  
Investment Division  
100 King Street West, Suite 5715  
Toronto, ON M5X 1E4, Canada  
416.362.8411



This Brochure Supplement provides information about Amneet Singh and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1984

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

- B.E., Electronics Engineering, Punjab Engineering College
- M.B.A., Indian Institute of Management Bangalore
- Masters in Financial Engineering, 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, Russell Investments

### **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:**

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### **SUPERVISION:**

Samuel Pittman is responsible for the supervision and oversight of Amneet. Samuel Pittman is a Managing Director, 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.

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## Soeren Soerensen, CFA

Director, Senior Portfolio Manager, Equity  
Investment Division  
Rex House, 10 Regent Street  
London SW1Y 4PE  
44.20.7024.6000



This Brochure Supplement provides information about Soeren Soerensen and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1982

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

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

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

- 2020 to 2024 - Portfolio Manager, Equity, Russell Investments
- 2024 to Present - Senior Portfolio Manager, Equity, 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:**

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### **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

Senior Portfolio Manager, Customized Portfolio Solutions, Asia  
Investment Division  
Level 28, 85 Castlereagh Street  
Sydney NSW 2000  
206.505.7877



This Brochure Supplement provides information about Andrew Zenonos and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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, 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:**

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### **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, FRM, CAIA

Portfolio Manager, Alternatives  
Investment Division  
575 Fifth Avenue, 35th Floor  
New York, NY 10017  
212.702.7900



This Brochure Supplement provides information about Nikki Zhou and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

### **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)\*
- Financial Risk Manager (FRM)†
- Chartered Alternative Investment Analyst (CAIA)‡

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

- 2020 to 2022 - Portfolio Analyst, Multi-Asset Solutions, Russell Investments
- 2022 to 2024 - Senior Portfolio Analyst, Multi-Asset Solutions, Russell Investments
- 2024 to 2025 - Associate Portfolio Manager, Multi-Asset Solutions, Russell Investments
- 2025 - Portfolio Manager, Multi-Asset Solutions, Russell Investments
- 2025 to Present - Portfolio Manager, Alternatives, 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:**

Vic Leverett is responsible for the supervision and oversight of Nikki. Vic Leverett is a Managing Director, Co-Head of Portfolio Management 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. Vic Leverett can be reached at 206.505.7877.

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†The Financial Risk Manager (FRM) designation is awarded by the Global Association of Risk Professionals (GARP) and certifies that an individual has the expertise to identify, assess, and manage financial risks across various domains. Candidates must pass two exams and demonstrate at least two years of relevant work experience.

‡The Chartered Alternative Investment Analyst (CAIA) Charter, offered by the CAIA Association, is a globally recognized designation for professionals specializing in alternative investments (e.g., hedge funds, private equity, real estate). Candidates need a bachelor's degree plus one year of finance experience or four years of finance experience, and must pass two exams covering qualitative analysis, trading theories, indexation, and benchmarking.

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## Nick Zylkowski, CFA

Managing Director, Co-Head of Customized Portfolio Solutions  
Investment Division  
401 Union Street, 18th Floor  
Seattle, WA 98101  
206.505.7877



This Brochure Supplement provides information about Nick Zylkowski and supplements the RIM Brochure. You should have received a copy of that Brochure. Please contact us at 206.505.4860 or [russellcompliance@russellinvestments.com](mailto:russellcompliance@russellinvestments.com) if you did not receive the RIM Brochure, or if you have any questions about the contents of this Brochure Supplement.

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

**Year of Birth:** 1985

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

- B.A., Mathematical 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 to Present - Managing Director, Co-Head of Customized Portfolio Solutions, 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:**

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### **SUPERVISION:**

Kate El-Hillow is responsible for the supervision and oversight of Nick. Kate El-Hillow is a President and Chief Investment Officer 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. Kate El-Hillow can be reached at 206.505.7877.

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