

# 2021 ANNUAL LEADERSHIP CONFERENCE

## Frederick M. Pinto, CFA Senior Vice President, Head of Asset Management Aviso Wealth / NEI Investments



Fred Pinto is Head of Asset Management for Aviso Wealth, a fully integrated wealth management services firm with over \$100 BB in Assets under Administration (AUA). It is one of Canada's largest firms in the wealth management industry as it serves the needs of virtually all of Canada's credit unions.

The Asset Management division, operating under the NEI Investments brand name, is the Canadian leader in Responsible Investing and has over \$14.5 BB in Assets under Management (AUM) across its investment funds and other solutions. In his role, Fred provides strategic business oversight and overall leadership to the asset management division and sits on several of the firm's internal operating committees, including its Executive Committee.

Prior to assuming this role in April 2018, Fred was the Head of Wealth and Asset Management for Qtrade Financial Group, a leading wealth management services firm providing business-to-business services to the Canadian credit union marketplace and to a number of Canada's leading financial services organizations.

Before joining Qtrade Financial Group in 2011, he held a series of progressively more senior sales and management roles at Russell Investments Canada Limited across the firm's retail and institutional business lines.

Fred is a CFA Charterholder and is a Past Chair of the Board of CFA Society Toronto. Through the CFA Society, Fred is a member of its Governance and Nominations Committee. He also sits on the Board of Directors for the Oakville Community Foundation and is a member of its Investment Committee. He is also part of the Investment Committee for the Appleby College Foundation. In addition, he is a member of the Public Policy Committee for the Canadian Coalition of Good Governance.

Fred holds a BA (Honours) from the University of Toronto and an MBA from the Richard Ivey School of Business at Western University.



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