

Meet BMO Global Asset Management's Responsible Investment team

From the launch of Europe's first ethically screened fund in 1984 and our position as a founding signatory of the UN Principles for Responsible Investment, to our comprehensive suite of Responsible Funds and reo® service available today, we have an outstanding heritage in ESG and active ownership. Key to delivering high-quality environmental, social and governance (ESG) solutions is our Responsible Investment (RI) team, with a breadth and depth of experience in this area.



Alice Evans, Director and Co-Head

Alice is a Director and Co-Head of the Responsible Investment (RI) Team. She returned to BMO Global Asset Management in 2018 having previously worked here as a fund manager from 2010 to 2016, most recently as Co-Lead Manager of the Responsible Global Equity Fund. Prior to BMO, Alice gained ten years of investment experience initially at JP Morgan Asset Management then at Henderson Global Investors, as a fund manager on the Sustainable & Responsible Investment funds, and as a healthcare sector specialist. Alice has a successful track record as a portfolio manager in responsible investment and brings the RI team first-hand experience of integrating ESG issues into investment research and decision making. Outside BMO, Alice holds a pro bono role as a panel member for the funding programme of the National Institute of Health Research. Alice holds an MSci in Physics from the University of Bristol and is a CFA Charterholder.



Vicki Bakhshi, Director

Vicki is a Director within the RI team, where she specializes particularly in climate change and impact investing issues. She joined the firm in November 2006, prior to which she spent five years in the UK government, including as the Prime Minister's policy adviser on climate change, and as a senior member of the team responsible for the Stern Review on the Economics of Climate Change. She also spent three years as a lead writer at the Financial Times, and two years as an economist at the Bank of England. Vicki is on the Board of the Institutional Investors Group on Climate Change and chairs the UKSIF Policy Committee. Vicki holds an MSc in Economics from Warwick University and a BA in Philosophy, Politics and Economics from Oxford University.



Claudia Wearmouth, Director and Co-Head

Claudia is a Director and Co-Head of the Responsible Investment team. She joined the firm in 2007 and leads the RI team's ESG research for BMO Global Asset Management's screened funds, including our Responsible fund range that includes both equity and fixed income investments. In addition, Claudia plays a leading role in managing key reo® client relationships. Claudia previously spent five years at a start-up charity called New Philanthropy Capital where she focused on analysing the impact of charitable giving and advising high net-worths and corporates on their charitable giving strategies. Claudia graduated in 2001 from Durham University with a BA in Economics.



Nalini Feuilloy, Director

Nalini is a Director within the Responsible Investment team at BMO Global Asset Management, based in Canada. Nalini joined the team in 2019 after working for 3 years with the UN supported Principles for Responsible Investment (PRI) as the Head of Canada. At the PRI, Nalini managed the Canadian base of institutional clients and educated the broader investment community on ESG issues and integration strategies. Prior to the PRI, Nalini worked at BlackRock Canada covering pension funds, endowments and foundations and also championed BlackRock's responsible investment initiatives locally. Previously, Nalini worked in the UK with Roubini Global Economics and the Gerson Lehrman Group, both alternative investment research firms supporting the buy-side. Nalini started her career with Accenture consulting with clients in the Technology, Media and Telecom sector.



Pieter van Stijn, Director

Pieter joined the team in 2018, focusing on climate change and energy. He is also involved in managing client relationships in The Netherlands. Prior to joining the team, Pieter spent 11 years at PGGM as Senior Advisor Responsible Investment and member of the Responsible Investment team. He was responsible for engagement and ESG integration activities in the field of climate change and energy and for execution of exclusions policies. Before that, Pieter worked at SNS Asset Management for 5 years as sustainable investment specialist. After graduating from Tilburg University as Development Economist, Pieter started his career as public affairs and communications advisor for a Dutch trade organization in the chemical industry.



Kalina Lazarova, Director

Kalina is a governance specialist in our Responsible Investment team who joined the firm in 2014. She leads on the development and implementation of BMO GAM EMEA's corporate governance policies. Prior to working here, Kalina held positions at engagement and voting specialists Governance for Owners and PIRC, and at Fidelity as a governance analyst. She has extensive experience in company engagement, voting, the development of corporate governance policies, and dialogue with policymakers on key governance issues. Her focus has been with UK and European companies, but she also has experience in Asian markets including South Korea and Japan. Kalina has a BA in European Studies and German from Kings College London and the London School of Economics (LSE), as well as an MSc in Regulation from the LSE, and a postgraduate certificate in Finance from Birkbeck. She is bilingual in English and Bulgarian.



Juan Salazar, Director

Juan is a research and engagement specialist with over 17 years of experience, 7 of which have been at BMO Global Asset Management. He conducts research and engages on a range of environmental, social and governance (ESG) issues with companies across emerging and frontier markets, with the aim of assessing ESG risk management practices across our holdings and promoting their improvement. Prior to joining the firm, Juan worked in credit risk management at ABN AMRO Bank, assessing credit and ESG risks present in the bank's global corporate lending operations. Juan holds a master's degree in International Affairs from Columbia University and a BSc in Industrial Engineering. Juan is a native Spanish speaker.



Nina Roth, Director

Nina is a Director in BMO Global Asset Management's Responsible Investment team. She joined the firm in 2019 and focuses on managing client relationships in Germany and on ESG analysis for a range of sectors. Most recently Nina worked at Germany's development agency (GIZ), engaging emerging markets financial institutions and their regulators on sustainable finance. Nina joined GIZ in 2016 from the Swiss bank UBS where she was responsible for environmental and social risk (ESR) management in the Asia Pacific region, based in Hong Kong. Previously Nina worked for UBS in Zurich and New York, as well as for Deutsche Bank in Frankfurt, where she established the bank's ESR framework. In 2014, Nina founded the Roundtable on Sustainable Palm Oil's financial institutions task force. Nina holds a Master's degree in political science (Free University Berlin, Germany).



Daniel Jarman, Vice President

Daniel Jarman is a Vice President in BMO's Responsible Investment team, focusing on corporate governance. He was previously at voting service provider ISS, which he joined in 2006 following two years at Manifest. Daniel became ISS's Head of UK Governance Research in 2009, responsible for the publication of reports and vote recommendations on UK-listed companies. He subsequently led the Customised Research team in London, providing ESG policy development and application services to UK institutional investors. Daniel was also a member of the Global Policy Board for ISS. Daniel currently represents BMO on the Investment Associations Remuneration and Share Schemes Committee and sits on the ESG Committee of BMO Real Estate Partners and the ICGN's Board Governance Committee.



Alan Fitzpatrick, Vice President

Alan Fitzpatrick joined the firm in 2019 as Vice President, Product Specialist in the Responsible Investment team. He is responsible for overseeing the global delivery of our global reo[®] business with a particular focus on managing the relationships with a number of reo[®] clients. He was previously at Hermes EOS, which he joined in 2016, as Manager - Client Development, where he was responsible for managing the relationships with a number of global clients and assisting in the development of the client service offering. Prior to joining Hermes EOS, Alan was a Corporate Account Manager for leading UK property tax specialist, CVS. He has significant experience managing the relationships of strategic clients and developing a company's service offering. For almost eight years, he also worked with one of Ireland's leading life assurance companies, New Ireland Assurance, in a number of sales support and business development positions. Alan holds a BA in Marketing from the Marketing Institute of Ireland and has been awarded Professional Diplomas in Financial Advice and Retirement Planning by LIA in Dublin.



Rosa van den Beemt, Vice President

Rosa is a corporate engagement practitioner with over 6 years' experience in the responsible investment industry and joined the Responsible Investment team in 2020. Prior to joining BMO Global Asset Management Rosa was Senior ESG Manager at NEI Investments, the asset management arm of Canadian wealth firm Aviso Wealth, where she lead the proxy voting program as well as various corporate engagement initiatives on ESG topics. Rosa has extensive experience in North American corporate governance, engaging management and board members on ESG and served on the Steering Committee for the Investor Alliance for Human Rights aimed at education on, and integration of, the investor responsibility to respect human rights. At BMO GAM Rosa focuses on engagement and voting of the Canadian market, including the oil and gas sector. She holds a BA in Political Science and an MSc in International Development Studies from the University of Amsterdam.



David Sneyd, Vice President

David joined the Responsible Investment team in 2017 and has over 10 years of ESG experience. Prior to joining the firm David was ESG Manager at Fidelity International, responsible for their ESG integration programme, having previously held senior research positions at the governance research agencies ISS and PIRC. David has extensive experience with a European and US coverage on researching ESG topics, engaging with companies at a board/senior management level and dialoguing with policy makers. In addition he has been involved in integrating ESG themes into the investment research and decision-making processes. He has the Investment Management Certificate (IMC) from the CFA Society. He also holds a BA in Philosophy from Sussex University and an MSc in Philosophy and Public Policy from the London School of Economics.



Thomas Hassl, Senior Associate

Thomas is an Analyst in the RI team, focusing on engagement, voting and strategic data analysis. In his role, Thomas focuses on the Chemicals and Industrials, with secondary responsibilities for other industries. Prior to joining BMO Global Asset Management, Thomas worked for more than two years at the responsible investment research provider Sustainalytics, where he was conducting quantitative and qualitative analysis on a variety of ESG-related themes, including sector reports and thematic studies. In addition, Thomas was a member of Sustainalytics' product innovation team, designated to enhance and further develop the product suit of the company. Thomas holds a Master's degree in Banking and Finance from the University of Innsbruck as well as a Bachelor degree in Management and Economics.



Tenisha Elliot, Senior Associate

Tenisha joined the Responsible Investment team in 2013 with extensive knowledge of the mechanics of proxy voting and data management. Since then she has progressed in to the role of research and engagement analyst focusing on emerging market corporate governance and the analysis of environmental and social risks for companies within the retail and service sectors. Tenisha holds a BSc with Honours in Business Economics from the University of Westminster, the Investment Management Certificate (IMC) and the Investment Operations Certificate (IOC).



Derek Ip, Senior Associate

Derek Ip joined the firm in 2019 as Senior Associate in the Responsible Investment team. He was previously at S&P Trucost, an ESG data provider, which he joined in 2015. He has significant experience consulting banks and investment managers on environmental risks, primarily climate change. During 2017-2018, he acted as an external policy adviser on green finance at the City of London Corporation in parallel to his role at S&P Trucost. Prior to his experience in Europe, he was with RESET Carbon in Hong Kong, providing supply chain sustainability analysis and engagement services to major international brands. Derek studied at the University of Edinburgh and has a MSc in Carbon Finance.



Emma Lupton, Vice President, Analyst

Emma joined BMO Global Asset Management in 2016 as an analyst on the Responsible Investment team. In her role, Emma engages in particular with companies in the food and beverage and retail sectors, covering issues including water, supply chain management, natural capital, packaging and pollution. Emma also leads on the work relating to the UN Sustainable Development Goals (SDGs), which includes mapping portfolios to their SDG alignment and how the engagement incorporates the Goals and underlying targets. Emma works closely with the global equities team to help run the BMO SDG Engagement Global Equity Fund. Immediately prior to joining, Emma worked at the environmental data provider CDP driving the corporate water stewardship agenda in Europe and boosting disclosure and transparency on water. Previously Emma worked with Alliance Trust to formalise the integration of water into their investment decision-making process. Emma also managed the corporate water stewardship programme for Global Water Intelligence and has a background in wealth management. She holds an MSc in Environmental Technology, specialising in Water Management (Imperial College London) and the Investment Management Certificate of the CFA Society of the UK.



Olivia Baker, Associate Analyst

Olivia joined BMO Global Asset Management in 2013 as a Data & Reporting Analyst within the RI team. Her role consist of providing data and reporting support to the RI team. She is responsible for the production of client reports, statistical analysis for existing and potential clients and assists in the screening process for investment in the Responsible Fund range. Olivia previously worked as an ETF Administrator for Capita IRG Trustees Ltd, here she carried out the day to day administrative tasks of processing and inputting ETF instructions for Capita's clients.



Catherine Hoyle, Associate Analyst

Catherine is an analyst in the RI team with a focus on emerging market debt. She joined BMO Global Asset Management in 2015 and was previously Product Specialist for the Emerging Market Debt team in London. Prior to being awarded her degree she completed internships with the European Equities team at Henderson Global Investors, the UK Private Wealth Management team at Goldman Sachs, the Asset Management and Private Banking divisions of EFG International in Zurich, and the Equity Research team at Marketfield Asset Management in New York. She graduated from the University of Oxford with a degree in Modern Languages (German & Italian), and has passed Level I of the CFA Program.



Sunny Brar, Proxy Administration Analyst

Sunny is an analyst in BMO Global Asset Management's Responsible team, joining the firm in February 2020. Sunny leads the administration of proxy voting services and vote management. Prior to joining BMO, Sunny provided proxy voting, account administration and reporting assistance as a Voting and Engagement Support team member for Hermes Investment Management. Sunny also spent over three years providing ESG research, screening and engagement expertise for companies across the materials, oil & gas, utilities, industrials and retail sectors in Canada. Sunny holds a BA in International Studies and an MA in International Relations. Daniel currently represents BMO on the Investment Associations Remuneration and Share Schemes Committee and sits on the ESG Committee of BMO Real Estate Partners and the ICGN's Board Governance Committee.



Tim Bond, Associate Analyst

Tim is an analyst in the RI team, with a focus on screening for the Responsible Fund range and support on RI reporting activities. He initially joined the firm in 2015, as a member of the RFP team, where he predominantly worked on RI-related proposals. He holds a Master's in Chemistry (MChem) from Durham University and has passed CFA Level 1.



Marcus Wilert, Vice President

Marcus joined BMO GAM in 2020 and is primarily responsible for analysis and engagement with the chemicals, consumer staples, consumer discretionary and hospitality sectors. He focuses on biodiversity and supply chain human rights across sectors, and leads our sustainable food engagement project. He has 13 years of experience of managing supply chain human rights and environmental sustainability programmes with H&M, Waitrose and Primark across Asia, Africa, Middle East, Europe and the Americas. Prior to joining BMO, Marcus worked for EOS at Federated Hermes as a corporate stewardship specialist engaging Asian companies in the technology, finance, automotive and materials sectors on ESG issues while co-leading the development of the wider human rights engagement programme. Marcus holds a Postgraduate Certificate in Sustainable Business from the University of Cambridge and a MSc in Economics and Business from the Stockholm School of Economics.