

## **Brian A. Hellmer, CFA, CIPM**

Brian Hellmer is currently the Managing Director of Global Public Market Strategies at SWIB. In this role, Mr. Hellmer oversees the agency's internal public market strategy teams that collectively run over \$60 billion. Mr. Hellmer is also a member of SWIB's asset review group, which helps monitor the pension plan's asset allocation and risk exposure as market conditions evolve. His previous role at SWIB was as Managing Director of Public Equities, which he held from 2016-2019.

Prior to his role at SWIB, Mr. Hellmer was the Director of the Hawk Center for Applied Security Analysis at the University of Wisconsin-Madison's School of Business. As part of that role, Mr. Hellmer trained future professional investors via a year-long class where MBA students manage over \$50 million.

From 1996 to 2009, Mr. Hellmer was a Senior Portfolio Manager and Director of Research at Northern Capital Management, an employee owned high-net worth and institutional investment manager located in Madison Wisconsin. During his tenure, Mr. Hellmer was co-portfolio manager of a growth fund that was named the Lipper's "Growth Fund of the Year" in 2000.

Prior to his work at Northern Capital, Mr. Hellmer worked for Bank of America's investment subsidiary in Boston and Hartford as both an analyst and investment strategist. During his time at Bank of America, Mr. Hellmer covered various industries such as Retail, Media & Entertainment, Restaurants, Medical Devices and Financial Services.

Mr. Hellmer is a Chartered Financial Analyst and holds a Certificate in Investment Performance Measurement from CFA Institute. He is also the current President of the CFA Society of Madison. In addition to his work for the CFA Society, Mr. Hellmer has served on numerous nonprofit boards and has been active in promoting increased financial literacy. As part of those efforts, he served as the financial consultant to the animated children's series "Secret Millionaire's Club" featuring Warren Buffett.

Mr. Hellmer has an MS and BBA degree from the Wisconsin School of Business and is an alumnus of the School's Applied Security Analysis Program.