

Joe Elegante, CFA

Senior Portfolio Manager

UBS Asset Management

Joe is a Senior Portfolio manager on the Global Equity Team with responsibilities for managing both US and Global equity strategies for UBS Asset Management. He is the Lead Portfolio Manager for the Global Sustainable equity strategies, UBS Long Term Themes and US equity strategies. Joe also serves as co-PM for the Global Sustainable-Integrated equity strategies.

Before joining UBS-AM, Joe worked as a portfolio manager at RMB Capital Management where he managed several equity strategies including a multi-cap core, dividend growth and a small cap-focused special situations strategy for institutional and private clients.

Prior to joining RMB Capital, Joe worked for 12 years as a senior portfolio manager at AllianceBernstein where he was a member of the Large Cap Growth Team. In this position he managed a \$15 billion equity strategy, which included individual institutional accounts, a mutual fund, Luxembourg fund and assets on behalf of the private client division for Sanford Bernstein. His responsibilities included portfolio construction, fund governance, security selection and risk management.

Joe has served as mentor at UBS for the past three years, to develop younger talent within the organization and to help further improve diversity throughout UBS. Joe is a CFA Charterholder, a member of the CFA Institute and the CFA Society of Chicago.

Years of investment industry experience: 28

Education: Miami University (US), BS; Case Western Reserve University's Weatherhead School of Management (US), MBA