

## Julianna Spiropoulos, CFA

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### EDUCATION

1996-1998 **Chartered Financial Analyst (CFA) professional designation**  
 1992-1994 **Master of Business Administration, Specialization: Management of Financial Resources**, The University of Calgary  
 1988-1992 **Bachelor of Science in Actuarial Science**, The University of Calgary

### PROFESSIONAL EXPERIENCE

#### **Aon Hewitt Inc. – Calgary, Alberta**

Mar/13-present **Associate Partner**

Nov/11-Mar/13 **Senior Consultant**

- Provide investment advice to private and public sector pension plans and coordinate and deliver risk management projects for clients based in Western Canada
- Specialize in helping clients diagnose and manage their pension investment risk including asset-liability management, dynamic asset solutions, risk monitoring, de-risking and derivatives overlay strategies and liability driven investment solutions
- Investment Consulting Market Lead for Alberta

#### **Suncor Energy Inc./Petro-Canada – Calgary, Alberta**

Aug/09-Sep/11 **Manager, Pension Investments, Suncor Energy Inc.**

Management of the merged companies' defined benefit (DB) and defined contribution (DC) pension plan investments with a total market value of over \$2.2 billion. Key additional experience includes:

- Determining impact of merger on DB and DC pension plan investments and service providers and making recommendations to improve alignment and efficiency
- Using extensive governance experience to review legacy company governance structures and prepare recommendations for alignment

Mar/03 – Aug/09 **Manager, Pension Investments, Petro-Canada**

Management of the company's defined benefit and defined contribution pension plan investments with a total market value of \$1.2 billion. Also act in an advisory capacity for global pension plans in U.S., U.K., Norway, Netherlands and Germany. Key responsibilities include:

- Managing external service providers including fund managers, actuaries, consultants, recordkeepers, custodians and trustees
- Preparing and delivering presentations and supporting material to senior executives, Pension Committee of the Board of Directors and Employee Pension Advisory Committee
- Advising on DB asset mix and DB and DC investment structures including risk/return analysis
- Completing pension studies and projects on investment policy, plan objectives, asset/liability matching, risk tolerance, asset allocation, rebalancing, investment guidelines and performance measurement criteria
- Researched, completed Committee education on and implemented Liability Driven Investment strategy
- Advising on financial implications of actuarial estimates and valuations
- Managing pension governance processes and structure including researching industry trends and recommending changes to senior management and the Pension Committee of the Board of Directors
- Advising on plan and manager performance versus benchmark and peer universe, adherence to investment style, performance attribution, trading activities, organizational changes of service providers
- Coordinating search for external service providers and recommending retention and termination to Management Pension Committee and the Pension Committee of the Board of Directors
- Working with consultants to create education programs to meet needs of pension fiduciaries
- Advising local management for global pension plans (investment policy/strategy, manager selection, performance measurement, custody selection, reporting)
- Managing pension staff, including providing guidance and leadership and participating in overall department leadership teams and initiatives

Aug /00-Mar/03 **Manager, Treasury**

- Managed 3-person department, including leading staff to optimize department objectives, setting expectations and reviewing performance, creating a stimulating work environment and ensuring access to appropriate career development
- Effectively managed over 15 worldwide bank relationships including negotiation of fees and agreements
- Managed foreign exchange and money market trading operations and corporate funding/investing requirements including the planning and management of \$1.2 billion in bilateral credit facilities and a \$750 million commercial paper program

- Advised other departments on financial and banking issues including International, East Coast and Downstream to maximize value and efficiencies while minimizing costs
- Responsible for ongoing management and monitoring of interest rate and foreign exchange exposures

Jan /98-Aug/00 ***Coordinator, Pension Investment***

- Managed investments for \$1 billion defined benefit and defined contribution pension plans
- Monitored and appraised external fund managers, actuaries, trustees and consultants
- Reviewed and recommended changes to fund manager structure, asset mix policy, and investment strategy
- Communicated to Management and Board Pension Committees

Jul /94-Dec /97 ***Analyst, Treasury & Corporate Finance***

- Daily asset/liability management including foreign exchange and money market trading for various Petro-Canada entities
- Responsible for 12-month and daily cash forecasting
- Analyzed financial risk including foreign exchange and interest rate risk
- Effectively managed network of domestic and foreign banking relationships

Summer 1993 ***Accounting Clerk***

- Input monthly crude oil transactions
- Analyzed and reorganized database