

Rebecca Jacques - General Manager Association of Goals Based Advice

Rebecca is a highly experienced senior investment specialist who has worked across many facets of the advice chain. Highly regarded for her strong commercial acumen, her persuasive personality and her ability to work with senior and multidisciplinary stakeholders, she has built her reputation through her passion for industry knowledge and her ability to transform complex information into simple and understandable key messages.

Rebecca has 20 years' experience as an analyst in Funds Management, commencing her career with FPI Research/Navigator where she built the first Australian downside deviation investment model portfolios. Rebecca then joined ASSIRT Research where she implemented and built the leading Research Process in the Australian Marketplace for the ASSIRT Research Business to look at Alternative Assets and Structured Products, in addition she led a team of 6 Investment Analysts and ultimately became the CEO of ASSIRT Research. Rebecca then went on to become the COO of a start-up hedge fund manager in Australia and then joined Deutsche Asset Management as an Investment Specialist where she worked with the Global Head of Risk Management, the Global Head of Research, Product Development and various Portfolio Managers to build, launch and gain ratings on a number of investment vehicles.

Rebecca is now the General Manager of AGBA which is an industry association set up to assist advisers in the implementation of goals based investment outcomes. In addition, Rebecca works as an Investment Consultant to a number of businesses in the financial services industry.

Experience

Rebecca brings years of experience and expertise at a very senior level to the management of clients' portfolios. Previous roles have included:

- CEO ASSIRT Research and Head of Manager Research
- COO of Vertex Capital Management (boutique market neutral manager)
- Investment Specialist – Deutsche Asset Management
- Risk Management Consultant – Naos Asset Management

Investment Committee Experience

- Securator Investment Committee
- ASGARD Model Portfolios
- Melling Capital Management
- ARRIA Meet the Manager Due Diligence Forums