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 Let's start a conversation

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- **Access** to our investment teams
- **Easy-to-tailor content** to showcase your value

Jon joined BMO Global Asset Management in 2015; his responsibilities include conducting top-down macro research with a focus on portfolio construction and working with clients to develop holistic investment solutions. In addition, Jon serves as co-manager of the BMO Target Risk Funds and the BMO Target Date Retirement Funds.

Jon began his investment industry career in 2003 at UBS Global Asset Management, where he was a portfolio manager from 2003 to 2015. At UBS, Jon was a voting member of the asset allocation committee and deputy head of currency. In addition to currency portfolios, he managed global tactical

asset allocation and multi-asset portfolios.

Jon holds an M.B.A. in analytic finance and economics from the University of Chicago Booth School of Business and a B.S. in finance from Valparaiso University. In addition, he is a CFA® charterholder.



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