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Senior appointments in Dublin and London expand Equity Trustees Fund Services global team

Three new appointments in the Dublin and London offices of Equity Trustees Fund Services have strengthened the capability of the 130-year-old Australian business as it pursues its global growth objectives.

“The Fund Services division of our business has built a market leading proposition over two decades in independent fund governance,” said Harvey Kalman, Head of Global Fund Services at Equity Trustees.

“It’s critical in maintaining our reputation for independent expertise and client service to appoint experienced members of staff that can continue to allow us to provide a market leading service to our clients and the investors in the funds for which we are responsible,” he said.

The appointees will report to Kevin Lavery, CEO (Ireland) and Chief Operating Officer (UK & Europe) of Equity Trustees Fund Services. They are:

Ronan Walsh, Investment & Portfolio Risk (Dublin)

With 20 years’ experience spanning Australia and Europe, Ronan joins the team to head up our Independent Investment and Portfolio Risk oversight function. With a proven track record in all areas of investments including fund risk, strategic asset allocation, asset management, portfolio construction, governance and foreign exchange markets. He has previously held roles including CIO at Crescent Wealth, GM of Investments at REST Industry Super, as well as roles with VicSuper, Russell Investments, Citigroup Global markets, MLC Investment Management and Lend Lease Investment Management.

James Ellison, Head of Operations (London)

James was formerly the Head of Fund Accounting Oversight at BMO Global Asset Management (EMEA) where he was responsible for more than 20 fund structures incorporating 175 sub-funds across UK, Luxembourg, Ireland, Cayman and Guernsey and AUM of around €40bn. Previously he held roles as fund controller at JP Morgan Asset Management and Goldman Sachs.

David Ryan, Investment Oversight Manager (Dublin)

David joins Equity Trustees after three years with global custodian, fund administrator and asset servicing provider Société Générale Securities Services. Prior to that, David worked at leading asset servicing providers CACEIS and International Financial Data Services.

“Our newest team members each bring significant expertise to our European business,” said Mr Lavery. “They each have exceptional backgrounds having in worked with major global asset managers and service providers and bring a deep understanding of the regulatory and operational environments from around the globe. We welcome them to Equity Trustees and congratulate them on their appointments.”

Equity Trustees Fund Services provides independent fund governance, risk and compliance, product development and regulatory reporting services to investment managers, from locations in Melbourne, Sydney, London and most recently Dublin. From our London and Dublin bases, the company provides a comprehensive range of UCITS Management Company and Alternative Investment Fund Manager (AIFM) services to domestic and international Investment managers i.

More about Equity Trustees Fund Services available at www.equitytrustees.com

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