



Appointment of Katy Forbes as Chief Investment Officer

We are delighted to welcome Katy Forbes to our team at North Capital. Katy's experience & breadth of knowledge will enhance our investment team and our institutional quality, multi-asset, discretionary and advisory services. It is encouraging to be able to attract an individual of such caliber to lead the investment team and help us serve the sophisticated needs of our growing client base. We also want to highlight another new joiner to the team – Sarah Jones joined us in the middle of October and, if you call into the main switchboard, you are likely to speak to her. Sarah is our new office manager, and we wish her and Katy good luck in their new roles.

Brief biography and comment from Katy Forbes

Katy has over 20 years of experience in macro investing. She has spent most of her career at Standard Life Investments (more recently abrdn) with senior roles in both Multi Asset and Fixed Income portfolio management. Katy was a member of the Asset Allocation Committee as well as the Strategic Investment Group and has experience working with a wide range of clients. Katy is a CFA charterholder.

“It is great to join North Capital Management at such an exciting time. My focus will be on further development of the firm's central investment proposition and augmenting our coverage across all our client focused investment services. Our processes are tailored to the very unique set of clients with specific investment requirements.

Andrew Spence, the former Chief Investment Officer of North Capital Management, will now focus on running the Aspen business. Aspen is a managed portfolio solution for the adviser community, for which North Capital and FNZ are stakeholders. Andrew will retain a position on the North Capital investment committee, supporting Katy in her new role.

For more information, please contact your adviser.

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