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Katrina F. Sherrerd serves as an advisor to the firm and is a member of the Executive Committee of the board of Research Affiliates. Research Affiliates is a global leader in smart beta, factor investing, and asset allocation. The firm creates investment strategies and tools based on award-winning research and delivers these solutions in partnership with some of the world's premier financial institutions. Katy joined Research Affiliates in 2006 as a managing director responsible for strategic planning and affiliate relations, and served as the CEO, president, and COO before becoming the vice chair.

Throughout her professional career, Katy has worked to further inventive and groundbreaking investment research and to encourage the continuing education of investment professionals around the world. Prior to joining Research Affiliates, she spent 19 years in various roles at CFA Institute, the largest global association of investment professionals. As part of the CFA Institute leadership team, she led the research and education effort, including oversight of the Financial Analysts Journal, and spearheaded strategic planning. She was also the executive director and member of the board of trustees of the CFA Institute Research Foundation. In 2020 and 2021, Katy was named by Barron's as one of the 100 Most Influential Women in US Finance.

Katy currently serves on the boards of Rayliant Global Advisors and the Institute for Quantitative Research in Finance as well as on the Women Investing in Security & Education (WISE) Tearing Down the Pink Wall Advisory Board. Katy is also a member of the Advisory Council for the Financial Analysts Journal.

Katy received her BS in finance from the University of Virginia's McIntire School, an MS from the Massachusetts Institute of Technology, and a PhD in finance from the Darden School at the University of Virginia. She holds the Chartered Financial Analyst® designation and is a member of CFA Institute.