富蘭克林證券投資顧問股份有限公司　函

地址：台北市忠孝東路四段 87 號 8 樓
聯絡方式：02-2781-0088

受文者：如行文單位

發文日期：中華民國 115 年 04 月 21 日
發文字號：(115)富字第 04-014 號
速別：
密等及解密條件或保密期限：
附件：

主旨：茲通知富蘭克林坦伯頓黃金、美股、全球股、債券基金經理人異動，請 查照。

說明：

一.　基金經理團隊異動如下：

基金名稱	現任基金經理團隊	新任基金經理團隊
富蘭克林黃金基金（本基金之配息來源可能為本金）	史蒂芬・蘭德 (Steve Land) 費德里・弗朗 (Frederick Fromm)	史蒂芬・蘭德 (Steve Land) 費德里・弗朗 (Frederick Fromm) 2026/5/1 新增: 馬修・亞當斯 (Matthew Adams)
富蘭克林高成長基金（本基金之配息來源可能為本金）	馬修・昆蘭 (Matthew Quinlan) 安麗塔・卡斯圖 (Amritha Kasturirangan) 納揚・塞斯 (Nayan Sheth)	馬修・昆蘭 (Matthew Quinlan) 安麗塔・卡斯圖 (Amritha Kasturirangan) 2026/5/31 刪除: 納揚・塞斯 (Nayan Sheth)
富蘭克林潛力組合基金（本基金之配息來源可能為本金）	格蕾絲・赫菲 (Grace Hoefig) 史利尼・維傑 (Srini Vijay) 史蒂芬・舒克 (Stephen Shunk) 奧利佛・黃 (Oliver Wong)	格蕾絲・赫菲 (Grace Hoefig) 史利尼・維傑 (Srini Vijay) 奧利佛・黃 (Oliver Wong) 2026/6/30 刪除: 史蒂芬・舒克 (Stephen Shunk)
富蘭克林坦伯頓吉富世界基金（本基金非屬環境、社會及治理相關主題基金）	派翠克・麥基根 (Patrick McKeegan) 唐納・胡伯 (Donald Huber)	派翠克・麥基根 (Patrick McKeegan) 2026/6/30 新增: 莎曼珊・馬修斯 (Samantha Mathews) 2026/6/30 刪除: 唐納・胡伯 (Donald Huber)

富蘭克林坦伯頓全球投資系列-精選收益基金（本基金有相當比重投資於非投資等級之高風險債券且基金之配息來源可能為本金）	麥可・薩爾姆（Michael Salm） 派翠克・克萊 （Patrick Klein） 艾伯特・陳（Albert Chan） 派翠西雅・歐康諾 （Patricia O' Connor）	麥可・薩爾姆（Michael Salm） 派翠克・克萊（Patrick Klein） 艾伯特・陳（Albert Chan） 派翠西雅・歐康諾 （Patricia O' Connor） 2026/5/31 新增: 馬修・沃克普(Matthew Walkup) 2026/6/30 刪除: 派翠西雅・歐康諾 （Patricia O' Connor）
富蘭克林坦伯頓全球投資系列-公司債基金（本基金主要係投資於非投資等級之高風險債券及符合美國 Rule 144A 規定之私募性質債券且基金之配息來源可能為本金）	葛倫・華勒（Glenn Voyles） 派翠西雅・歐康諾 （Patricia O' Connor） 布萊恩・迪芬巴赫 （Bryant Dieffenbacher） 詹姆士・麥吉華倫 （S. James McGiveran III）	葛倫・華勒（Glenn Voyles） 派翠西雅・歐康諾 （Patricia O' Connor） 布萊恩・迪芬巴赫（Bryant Dieffenbacher） 詹姆士・麥吉華倫 （S. James McGiveran III） 2026/5/31 新增: 羅伯・薩爾文(Rob Salvin) 2026/6/30 刪除: 派翠西雅・歐康諾 （Patricia O' Connor）
富蘭克林坦伯頓全球投資系列-歐洲非投資等級債券基金（本基金之配息來源可能為本金）	派翠西雅・歐康諾 （Patricia O' Connor） 皮耶羅（Piero Del Monte） 羅德・麥可菲（Rod MacPhee） 艾曼紐・泰希爾 （Emmanuel Teissier）	派翠西雅・歐康諾 （Patricia O' Connor） 皮耶羅（Piero Del Monte） 羅德・麥可菲（Rod MacPhee） 艾曼紐・泰希爾 （Emmanuel Teissier） 2026/5/31 新增: 葛倫・華勒（Glenn Voyles） 羅伯・薩爾文(Rob Salvin) 2026/6/30 刪除: 派翠西雅・歐康諾 （Patricia O' Connor）
富蘭克林坦伯頓全球投資系列-全球非投資等級債券基金（本基金之配息來源可能為本金）	麥可・哈森泰博 （Michael Hasenstab） 葛倫・華勒（Glenn Voyles） 派翠西雅・歐康諾 （Patricia O' Connor） 何英信（Calvin Ho）	麥可・哈森泰博 （Michael Hasenstab） 葛倫・華勒（Glenn Voyles） 派翠西雅・歐康諾 （Patricia O' Connor） 何英信（Calvin Ho）

		2026/5/31 新增: 強納森・貝克(Jonathan Belk) 羅伯・薩爾文(Rob Salvin) 2026/6/30 刪除: 派翠西雅・歐康諾 (Patricia O' Connor)
美盛布蘭迪全球固定收益基金	大衛・霍夫曼 (David F. Hoffman) 傑克・麥金泰爾 (Jack P. McIntyre) 安智特・薩林 (Anujeet Sareen)	大衛・霍夫曼 (David F. Hoffman) 傑克・麥金泰爾 (Jack P. McIntyre) 安智特・薩林 (Anujeet Sareen) 2026/5/31 新增: 布萊恩・克勞斯 (Brian Kloss) 陳翠西(Tracy Chen) 保羅・米爾查斯基 (Paul Mielczarski) 麥可・阿諾(Michael Arno) 2026/5/31 刪除: 大衛・霍夫曼 (David F. Hoffman)
美盛布蘭迪全球機會固定收益基金	大衛・霍夫曼 (David F. Hoffman) 傑克・麥金泰爾 (Jack P. McIntyre) 安智特・薩林 (Anujeet Sareen) 布萊恩・克勞斯 (Brian Kloss, JD) 陳翠西(Tracy Chen)	大衛・霍夫曼 (David F. Hoffman) 傑克・麥金泰爾 (Jack P. McIntyre) 安智特・薩林 (Anujeet Sareen) 布萊恩・克勞斯 (Brian Kloss) 陳翠西(Tracy Chen) 2026/5/31 新增 保羅・米爾查斯基 (Paul Mielczarski) 麥可・阿諾(Michael Arno) 2026/5/31 刪除: 大衛・霍夫曼 (David F. Hoffman)

二. 此項變動不會影響本基金既有之投資政策，經理人異動情況將做同步調整。

董事長 黃琡珺

正本：國泰人壽保險股份有限公司、新光人壽保險股份有限公司、元大人壽保險股份有限公司、安聯人壽保險股份有限公司、台灣人壽保險股份有限公司、南山人壽保險股份有限公司、凱基人壽保險股份有限公司、全球人壽保險股份有限公司、宏泰人壽保險股份有限公司、臺銀人壽保險股份有限公司、三商美邦人壽保險股份有限公司、第一金人壽保險股份有限公司、遠雄人壽保險事業股份有限公司、安達國際人壽保險股份有限公司、法商法國巴黎人壽保險股份有限公司台灣分公司、合作金庫人壽保險股份有限公司、英屬百慕達商友邦人壽保險股份有限公司台灣分公司
副本：

布蘭迪全球固定收益與全球機會固定收益基金經理人

2026/4/20 更新

布萊恩．克勞斯(Brian Kloss)

投資組合經理

富蘭克林坦伯頓固定收益團隊

- 布蘭迪全球策略的投資組合經理。
- 於 2009 年加入布蘭迪全球，並於 2026 年轉入富蘭克林坦伯頓固定收益團隊，在此之前，曾在多家資產管理公司擔任投資組合經理、非投資等級債分析師、股票投資組合經理，及國際稅務諮詢師等職務。
- 擁有美國維拉諾瓦大學法學院(Villanova School of Law)法學博士學位(J.D.)、史克蘭頓大學(University of Scranton)會計學學士學位，並擁有賓夕法尼亞州註冊會計師(CPA)資格。

Brian Kloss is a Portfolio Manager on select Brandywine Global strategies.
Brian joined Brandywine Global, a SIM of Franklin Templeton, in 2009 and moved to Franklin Templeton Fixed Income in 2026. Brian brings with him over 25 years of high yield and distressed debt experience.
Previously, Brian was co-portfolio manager at Dreman Value Management, LLC (2007-2009); high yield analyst/trader at Gartmore Global Investments (2002-2007); high yield and equity portfolio manager and general analyst at Penn Capital

Management, Ltd. (2000-2002); an analyst with The Concord Advisory Group, Ltd. (1998-2000); and an international tax consultant with Deloitte & Touche LLP (1995-1998).

Brian earned his J.D. from Villanova School of Law and graduated summa cum laude with B.S. in Accounting from University of Scranton. He is also a member of the New Jersey and Pennsylvania Bar and is a Pennsylvania Certified Public Accountant.

Brian L. Kloss, JD, CPA

Portfolio Manager

Brian Kloss is a Portfolio Manager on the Global Fixed Income team. He joined Brandywine Global in December 2009, bringing with him over 10 years of high yield and distressed debt experience. Previously, Brian was co-portfolio manager at Dreman Value Management, LLC (2007-2009); high yield analyst/trader at Gartmore Global Investments (2002-2007); high yield and equity portfolio manager and general analyst at Penn Capital Management, Ltd. (2000-2002); an analyst with The Concord Advisory Group, Ltd. (1998-2000); and an international tax consultant with Deloitte & Touche LLP (1995-1998). Brian earned his J.D. from Villanova School of Law and graduated summa cum laude with B.S. in Accounting from University of Scranton. He is also a member of the New Jersey and Pennsylvania Bar and is a Pennsylvania Certified Public Accountant.

https://brandywineglobal.com/Index.cfm?Page=About%20Us&Content=Our%20Team&ID=320181834

葛倫·華勒(Glenn Voyles)，CFA
富蘭克林坦伯頓固定收益團隊資深副總裁與非投資等級債董事
聖馬蒂奧,加州,美國

- 是多個美國與全球非投資級債投資組合首席與共同經理人。
- 於 1993 年加入富蘭克林基金集團，在獲任命為投資組合董事前，為非投資級債投組經理人暨研究分析師，主要研究能源產業。
- 擁有史丹福大學經濟學學士學位，並且擁有特許財務分析師(CFA)證照，也是舊金山證券分析師協會成員。

2025/10 更新

In addition to overseeing the corporate credit portfolio management team, Mr. Voyles' is the lead or co-portfolio manager of various US and global high yield accounts. Additionally, Mr. Voyles is a member of the firm's Fixed Income Policy Committee (FIPC).

Mr. Voyles joined Franklin Templeton in 1993. Prior to being appointed the Director of Portfolio Management, he was a high yield portfolio manager and research analyst with primary coverage of the energy sector.

Mr. Voyles holds a B.A. in economics from Stanford University. He is a Chartered Financial Analyst (CFA) charterholder, a member of Security Analysts of San Francisco (SASF), and the CFA Institute.

2024/7 更新

富坦全球非投資等級債券基金

2026/4/20 更新

強納森．貝克(Jonathan Belk)，CFA
副總裁、研究分析師、投資組合經理
企業債
富蘭克林坦伯頓固定收益團隊

- 擔任多個非投資等級債券策略的投資組合經理，負責分析非投資等級與投資等級企業債中的媒體與工業產業，包括多元化媒體、廣播、製造、機械、設備租賃與其他工業服務等。
- 2004 年加入富蘭克林成為研究分析師，此前在其他公司曾負責評價與審計實務，在金融服務產業服務逾 20 年。
- 擁有達特茅斯學院(Dartmouth College)歷史學學士學位，擁有加州大學柏克萊分校(University of California, Berkeley)工商管理碩士學位。擁有特許金融分析師(CFA)證照，亦為已退休之註冊會計師(CPA)。

Franklin Global and U.S. High Yield

Jonathan Belk, CFA

Vice President Portfolio Manager, Research Analyst – Corporate Credit, Franklin Templeton Fixed Income
San Mateo, California, United States
Jonathan Belk is a vice president, research analyst, and portfolio manager in Corporate Credit for the Franklin Templeton Fixed Income Group and is based in San Mateo, California. As a portfolio manager, Mr. Belk is responsible for the analysis of high yield corporate bond portfolios.
He serves on the portfolio management teams of Franklin Liberty High Yield Corporate ETF (FLHY), Franklin Universal Trust (FT), Franklin Limited Duration Trust

(FTF) as well as global high yield and institutional high yield mandates. As an analyst, he is responsible for the analysis of high yield and investment grade corporate bonds across the media and industrials sectors, including diversified media, broadcasters, manufacturing, machinery, equipment rental and other industrial services.

Mr. Belk has over 20 years of experience in the financial services industry. He joined Franklin Templeton in 2004 as a research analyst. Prior to his current role, Mr. Belk was with KPMG as a manager in the valuation services practice in San Francisco and previously was with both the valuation & audit practices in Boston.

Mr. Belk holds a bachelor of arts in history from Dartmouth College and an MBA from the University of California at Berkeley. He is a Chartered Financial Analyst (CFA) charter holder and a member of the CFA Society of San Francisco and the CFA Institute. Mr. Belk also is a retired Certified Public Accountant (CPA).

馬修·亞當斯(Matthew Adams)，特許財務分析師(CFA)
副總裁、投資組合經理人、研究分析師
富蘭克林股票團隊
富蘭克林顧問公司(Franklin Advisers)
美國加州聖馬蒂奧

- 馬修·亞當斯是富蘭克林股票團隊的副總裁、投資組合經理人兼研究分析師，也是富蘭克林坦伯頓天然資源基金投資組合管理團隊成員，負責能源領域研究，並專注於石油與天然氣探勘、煉油公司，另還負責工業領域研究，包含運輸、航太國防。
- 在 2005 年加入富蘭克林坦伯頓基金集團之前，馬修·亞當斯曾在史密斯巴尼(Smith Barney)、貝爾斯登(Bear Stearns)、羅伯遜·史蒂芬斯(Robertson Stephens)擔任股票分析師，先前的研究經驗包含企業軟體、網路、運輸。
- 亞馬修·亞當斯擁有康乃爾大學經濟學學士學位、芝加哥大學布斯商學院會計與金融工商管理碩士學位，並持有特許財務分析師(CFA)執照。

Matthew J. Adams, CFA
Vice President, Portfolio Manager, Research Analyst
Franklin Equity
Franklin Advisers, Inc.
San Mateo, California, United States

Matthew Adams is a vice president, portfolio manager and research analyst for Franklin Equity. Mr. Adams is a member of the portfolio management team for Franklin Natural Resources Fund and has research responsibilities in energy, focusing on oil and gas exploration and refining companies. Mr. Adams also has research responsibilities in the Industrial sector including transportation and aerospace & defense companies.

Prior to joining Franklin Templeton in 2005 Mr. Adams previously worked as an equity analyst at Smith Barney, Bear Stearns and Robertson Stephens. His prior research experience includes enterprise software, internet and transportation industries.

Mr. Adams earned his B.A. in economics from Cornell University, an M.B.A. in accounting and finance from the University of Chicago Booth School of Business and is a Chartered Financial Analyst (CFA) charterholder.

富坦精選收益基金經理人

2026/4/20 更新

馬修．沃克普(Matthew Walkup)
投資組合經理
多元資產策略
富蘭克林坦伯頓固定收益團隊

- 多元資產策略投資組合經理，聚焦於利率與貨幣市場及波動。
- 2014 年加入百能投資，擔任量化研究分析師。
- 擁有美國麻省理工學院史隆管理學院(MIT Sloan School of Management)金融學理學碩士學位，擁有波莫納學院(Pomona College)數理經濟學學士學位。

Franklin Core Plus Bond, Franklin Strategic Income

Matthew J. Walkup

Portfolio Manager – Multi Sector, Franklin Templeton Fixed Income
Boston, Massachusetts, United States
Mr. Walkup is a portfolio manager for Franklin Templeton Fixed Income - Multi Sector, focusing on interest rate and currency markets and volatility.
He joined Putnam in 2014 and has been in the investment industry since 2012. Previously at Putnam, Mr. Walkup served as an Analyst and an Investment Associate in Quantitative Research.
Mr. Walkup earned an M.S. in Finance from the Massachusetts Institute of Technology Sloan School of Management and a B.A. in Mathematical Economics from Pomona College.

布蘭迪全球固定收益與全球機會固定收益基金經理人

2026/4/20 更新

保羅．米爾查斯基(Paul Mielczarski)
投資組合經理暨研究分析師
富蘭克林坦伯頓布蘭迪全球

- 負責提供全球總經研究與支援全球固定收益策略。
- 2023 年加入布蘭迪全球，並於 2026 年轉入富蘭克林坦伯頓固定收益團隊，之前曾擔任安大略省教師退休金計畫的投資組合策略董事。
- 於澳洲墨爾本蒙納士大學(Monash University)取得經濟學學士學位。

Paul Mielczarski

Paul is responsible for providing proprietary global macroeconomic research to support global fixed income strategies.

Paul joined Brandywine Global, a SIM of Franklin Templeton, in 2023 and moved to Franklin Templeton Fixed Income in 2026. Prior to joining Brandywine Global, he served as Director of Portfolio Strategy for two years at Ontario Teachers' Pension Plan after working for five years as a portfolio manager (2015-2022). Paul was also a global macro portfolio manager at Graham Capital (2011-2015) and Medley Macro Fund (2008-2011). Paul started his career at Credit Suisse where he worked both as a global macro strategist and a fixed income and FX proprietary trader (1999-2008).

Paul earned a B.S. in Economics from Monash University in Melbourne, Australia.

富蘭克林公司債基金經理人

2026/4/20 更新

羅伯．薩爾文(Rob Salvin)
投資組合經理
企業債
富蘭克林坦伯頓固定收益團隊

- **負責管理百能可轉換證券、全球與美國非投資等級債策略。**
- **於 2000 年加入百能投資，為企業債與免稅債主管，此前曾任職其他資產管理機構擔任董事職務，自 1986 年起即投身投資領域。**
- **擁有美國芝加哥大學布斯商學院(Booth School of Business, University of Chicago)工商管理碩士學位，擁有賓夕法尼亞大學華頓商學院(The Wharton School, University of Pennsylvania)理工學士學位。**

Franklin Global and U.S. High Yield

Rob Salvin

Portfolio Manager – Corporate Credit, Franklin Templeton Fixed Income
Boston, Massachusetts, United States
Mr. Salvin is a Portfolio Manager for Franklin Templeton Fixed Income and is responsible for managing Putnam's Convertible Securities, Global High Yield, and U.S. High Yield strategies. Based in the Boston office, he joined Putnam in 2000 and has been in the investment industry since 1986.
Previously at Putnam, Mr. Salvin was part of the Fixed Income division and served as Head of Corporate and Tax-Exempt Credit. Prior to joining Putnam, he was a Managing Director at BancBoston Robertson Stephens from 1997 to 1999 and was a Director at SBC Warburg from 1996 to 1997. Earlier, he served as an Analyst at

Chase Securities from 1993 to 1996 and was an Analyst at Broadview Associates from 1986 to 1991.

Mr. Salvin earned an M.B.A. from the Booth School of Business at the University of Chicago and a B.S. from The Wharton School at the University of Pennsylvania.

莎曼珊·馬修斯
投資組合經理人
富蘭克林股票團隊
美國紐約

- 現任富蘭克林股票團隊副總裁、投資組合經理人及綜合研究分析師。
- 2023 年加入富蘭克林坦伯頓基金集團，先前曾擔任 Point72 資產管理公司醫療保健研究分析師，專注於工具和診斷領域，也曾在 Cowen and Company 擔任醫療保健技術與分銷領域的股票研究助理，並在德意志銀行證券擔任股票研究助理，負責醫療技術和設備領域的研究，2015 年進入金融服務業。
- 擁有阿拉巴馬大學金融學士學位。

Samantha Mathews
Portfolio Manager Profile
Years of Experience: 10
Manager Location: New York, United States

Samantha Mathews is a vice president, portfolio manager, and generalist research analyst with Franklin Equity.
Prior to joining Franklin Templeton in 2023 Mrs. Mathews was a health care research analyst at Point72 Asset Management, with a focus on tools and diagnostics. Previously she was a health care technology & distribution equity research associate at Cowen and Company and worked at Deutsche Bank Securities as an equity research associate covering medical technology & devices. She joined the financial services industry in 2015.
Mrs. Mathews holds a B.S. in Finance from the University of Alabama.

布蘭迪全球固定收益與全球機會固定收益基金經理人

2026/4/20 更新

陳翠西(Tracy Chen), CFA
投資組合經理人
富蘭克林坦伯頓固定收益團隊

- 布蘭迪全球策略的投資組合經理。
- 帶領全球結構性信用債投資並於市場中尋求最具吸引力的價值機會，包括美國住宅房貸抵押債、商業不動產抵押債、資產抵押債與擔保貸款憑證，及歐洲資產抵押債與其他結構性產品。她的研究在 2007 年、2017~2019 年刊登於結構性融資期刊(Journal of Structured Finance)。
- 於 2008 年加入布蘭迪全球，並於 2026 年轉入富蘭克林坦伯頓固定收益團隊，此前在多家資產管理公司擔任結構型產品董事與諮詢。
- 擁有美國北卡羅來納大學教堂山分校財務企管碩士、美國研究碩士、及中國電子科技大學學士學位。
- 擁有特許財務分析師(CFA)及特許另類投資分析師(CAIA)執照。

Tracy Chen is a Portfolio Manager on select Brandywine Global strategies. She leads global structured credit investing and seeks the most attractive value in the global structured credit market, including investments in U.S. RMBS, CMBS, ABS, CLO, European ABS and other structured products. Tracy's research on structured products was published in the Journal of Structured Finance in 2007, 2017, 2018 and 2019.
Tracy joined Brandywine Global, a SIM of Franklin Templeton, in 2008 and moved to Franklin Templeton Fixed Income in 2026.
Prior to joining Brandywine Global, she was with UBS Investment Bank as Director of Structured Products, GMAC Mortgage Group (focusing on mortgage whole loan

pricing and trading), and Deloitte Consulting.
Tracy earned her MBA with a concentration in Finance from the University of North Carolina at Chapel Hill. She also holds an M.A. in American Studies and a B.A. from University of Electronic Science & Technology of China. Tracy is a CFA charterholder and a CAIA charterholder.

Tracy Chen is a Portfolio Manager on the Global Fixed Income team. She leads global structured credit investing and seeks the most attractive value in the global structured credit market, including investments in U.S. RMBS, CMBS, ABS, CLO, European ABS and other structured products. She joined the Firm in August 2008. Prior to joining Brandywine Global, she was with UBS Investment Bank as Director of Structured Products, GMAC Mortgage Group (focusing on mortgage whole loan pricing and trading), and Deloitte Consulting. Tracy earned her MBA with a concentration in Finance from the University of North Carolina at Chapel Hill. She also holds an M.A. in American Studies and a B.A. from University of Electronic Science & Technology of China. Tracy is a CFA® charterholder and a CAIA charterholder. Tracy's research on structured products was published in the Journal of Structured Finance in 2007, 2017, 2018 and 2019.
https://brandywineglobal.com/Index.cfm?Page=About%20Us&Content=Our%20Team&ID=579681549

布蘭迪全球固定收益與全球機會固定收益基金經理人

2026/4/20 更新

麥可．阿諾(Michael Arno), CFA
全球固定收益投資組合經理暨資深研究分析師
富蘭克林坦伯頓固定收益團隊

- 目前負責新興市場固定收益相關策略的研究分析與投資組合管理，為布蘭迪全球策略的投資組合經理與資深研究分析師。在此之前，自 2011 年起負責研究分析全球信用債與新興市場債市。
- 於 2006 年加入布蘭迪全球，並在 2026 年轉入富蘭克林坦伯頓固定收益團隊。
- 於天普大學(Temple University)取得財務學學士學位，並擁有特許財務分析師(CFA)證照。

Brandywine Global Fixed Income

Michael Arno, CFA

Portfolio Manager & Senior Research Analyst, Portfolio Manager – Global Fixed Income, Franklin Templeton Fixed Income
Philadelphia, Pennsylvania, United States

Mike is a portfolio manager and senior research analyst on select Brandywine Global strategies. He is responsible for providing research analysis and portfolio management on the firm's emerging market fixed income related strategies. Prior to this, he had been a research analyst on the team since 2011 with a focus on global credit and emerging markets.

Mike joined Brandywine Global, an Investment Group of Franklin Templeton, in 2006 and moved to Franklin Templeton Fixed Income in 2026. Mike initially joined Brandywine Global as a product specialist within client service.

Prior to joining Brandywine Global in 2006, Mike was an associate for the Vanguard Group (2004-2006). A CFA charterholder, he earned a B.S. in Finance from Temple University.