

SPEAKER BIOGRAPHIES



Dale Richards

Managing Partner & CEO, LakeFront Data Ventures Inc.

Prior to LakeFront, Dale was Chief Data Officer and president of corporate Enterprise Data Management (EDM) at SunGard, the top global financial services software firm. At SunGard, he led the firm's overall EDM strategy defining and launching an integrated data management strategy internally & in the market. At SunGard, Dale was one of the core founding members of the EDM council co-sponsored by IBM, BearingPoint and GoldenSource.

Prior to SunGard, Dale was President and CEO of FAME, a global leader in Energy and Financial data and data management services. FAME was acquired by SunGard in 2003. At FAME he restructured the company launching a successful strategy to leverage its data management capabilities into the emerging reference data management market. As a result, FAME attained solid profitability, growth and secured industry recognition by such respected venues as Waters magazine, which named FAME as the Top Global Data Management Solutions Vendor for 3 years in a row.

Prior to FAME, Dale was the founder, President and CEO of Benton Associates, Inc., a global consulting, data management software and analytics company he founded in 1992, acquired by FAME in 1998. Before founding Benton, he was Director of Business Development, Sales and Marketing at Algorithmics, Inc., held senior account management and sales positions at Reuters, and served as a senior product manager for Financial Times Interactive Data.

Dale is currently on the board of directors of Covarity, a firm providing software solutions for commercial loan monitoring. He is also on the board of Diaphonics, a voice biometrics solutions company focused on compliance in financial markets. Dale is also on the board of the Jazz Apprenticeship program, a NY-based forum for Jazz Education and musicianship.



Marc Odho

Managing Director & Partner, LakeFront Data Ventures Inc.

Marc Odho is responsible for providing clients with tactical and strategic consulting and advisory services, project management, expert advice and thought leadership in all aspects of Data Management, as well as defining and executing solutions and projects that address customer requirements. Prior to joining LakeFront Data Ventures, Marc was, Managing Director of SunGard Enterprise Data Management responsible for enterprise-wide data management strategy, SunGard's internal business unit data management requirements, as well as, engagements with strategic clients and vendors.

Marc has spent more than 20 years building and operating large-scale, commercial multi-asset class databases covering pricing, reference, and legal entity information. Marc provided professional services as a management consultant for four years to a leading Wall Street firm, major Stock Exchange, Risk Management company and financial data publisher in the area of financial data outsourcing, data strategy, building financial data warehouses, implementing data quality management services, revenue generation, and cost management for risk and operations.

Previously, Marc was the managing director for technology and market data at CIBC World Markets, and was senior vice president at Reuters, responsible for database production, data quality control, and software development to support product strategy.



Ed Ventura

Associate Partner, LakeFront Data Ventures Inc.

Ed Ventura is an associate partner of LakeFront Data Ventures Inc. with over twenty years of experience in financial services management. Most recently Ed was the Senior Product Manager of Asset Data Services for SEI, where he led the strategy and sourcing for redistribution and consumption of pricing and reference data. While at SEI, Ed led the development of a revised business strategy that provided SEI with a competitive advantage in its data redistribution business.

Prior to SEI Ed was principal of Ventura Management Associates LLC providing consulting services on portfolio reporting to retail financial services firms. Ed's background also includes various roles in the US and International private client businesses for Merrill Lynch, where he developed a client statement recognized as best-in-class by Smart Money and Kiplinger's. He has published articles in e.bill magazine and has contributed to stories recently published in Inside Reference Data.

Due to Ed's expertise in data management, he has served on the Consumer Constituency Group of Financial Information Systems Division (FISD) of the Securities Information Industry Association (SIIA) as well as on the Enterprise Data Management (EDM) Council in various working groups and committees. His views are sought out at industry forums, on panels, and at trade shows. Mr. Ventura received his BA and MPA degrees from C.W. Post College.

KEYNOTE SPEAKER



Steven Silberstein

Managing Director, Coastal Partners LLC

Mr. Silberstein is an investor and experienced financial services technologist. Previously, he was a Managing Director at Lehman Brothers Inc. where he was the Global Head of Prime Brokerage, and prior to that was the Chief Information Officer of the firm's Global Equities Division. Beforehand, Mr. Silberstein ran two venture-backed finance and technology firms. He was the President and Chief Operating Officer of MarketXT, Inc., an Electronic Communications Network ("ECN"), and previously Chief Executive Officer of FAME Information Services, Inc, a leading provider decision support solutions serving the needs of energy, financial services, government and commercial clients. He received a Bachelor's of Science degree in mathematics from Rensselaer Polytechnic Institute, where he also did graduate work in computer science.



Michael Atkin

Managing Director, EDM Council

Mike has been a professional facilitator and financial information industry advocate for over 20 years. He managed the Financial Information Services Division (FISD) of the Information Industry Association and established it as a neutral business forum for exchanges, data vendors and financial institutions. He has also been involved with many other organizations including the Reference Data Coalition (REDAC) and the UK Reference Data User Group (RDUG). He was a member of the SEC's Advisory Committee on Market Data and a member of both ISO TC68 and ANSI X9D. He has been the Managing Director of the EDM Council since February 2006.



Predrag Dizdarevic

Independent Consultant

Predrag Dizdarevic is currently an independent consultant and entrepreneur focusing on technology and services business within financial services industry. Predrag was formerly a Partner and Executive Vice President at Capco. As a member of the Executive Management Committee and Head of Capco Reference Data Services, Managed Services and Solutions, he developed and commercialized innovative and transformational business and technology solutions that drove recurring service, license and transaction revenues to Capco. Prior to joining Capco, Predrag was a President and CEO of Financial Technologies International (aka GoldenSource), transforming the firm into a strong, profitable and innovative software provider. Prior to FTI, Predrag held a variety of senior management positions with Computer Associates, where he was responsible for the development and deployment of new strategic initiatives in object databases, enterprise management, and application development systems.



James Hartley

VP Research, A-Team Group

Mr. Hartley, as VP Research for A-Team Group is charged with developing research products (like the upcoming A-Team Algorithmic Trading Directory) on behalf of A-Team focusing on the front-office, electronic trading, and reference data as well as contributing to consulting projects and events. Previously, as Chief Technologist of SIIA/FISD, Mr. Hartley developed and supported MDDL - Market Data Definition Language. He has facilitated the global conversation on Securities Processing Automation (SPA) including Reference Data and Straight-Through Processing related topics. Mr. Hartley was employed by Reuters Group (aka Bridge Information Systems) for five years as Catalyst, Office of the Chief Scientist and then Senior Architect for the Chief Architecture Office. At Bridge, Mr. Hartley concentrated on the development of leading edge technologies, including delivery mechanisms and user interface platforms, for the dissemination and representation of quotes, news, charts, and other financial information. Mr. Hartley has had global involvement and responsibilities in furthering new capabilities and products through training and technical leadership. Mr. Hartley has a Bachelor of Science in Electrical Engineering (Computer option) from The Ohio State University and a Masters Degree in Electrical Engineering from the University of Colorado at Boulder.



David Hirschfeld

Managing Director & COO, Modelware Group, Morgan Stanley

David Hirschfeld is an MD and COO of the Modelware Group within Morgan Stanley. The Modelware Group provides equity analytics and forecasting to Bankers, Credit Analysts, Private Equity Analysts and Traders. Structured products using the group's data and methodologies were recently launched in Europe and N. America. Previously, Mr. Hirschfeld was COO of Asset Control, the world's leading provider of reference data software and was instrumental in the Firm's recent sale to Fidelity Ventures. Prior to joining Asset Control, he was an MD at Citadel Investment Group, responsible for all the Firm's data needs. Other work history includes FVP at Merrill Lynch and Partner/CTO at Tudor Investment Group. He has also been a Floor Trader at the Chicago Board of Trade and a currency arbitrager. Mr. Hirschfeld holds a Masters in Economics from the University of Chicago and a BA in Economics from Duke University.

Anthony Maceroli

Managing Director, Fitch Ratings

Anthony (Tony) Maceroli has been involved in software development in the Financial Industry in New York for over 25 years. Tony has been the Managing Director of Information Technology for Fitch Ratings, a Nationally Recognized Statistical Rating Organization, for the past 7 years. Prior to that, Tony held management positions at JP Morgan, Cantor Fitzgerald Securities and Goldman Sachs & Co. Tony has a B.S. in Computer Science and Mechanical Engineering from the New Jersey Institute of Technology.



Jennifer Thompson

Vice President and Head of Information Services, Canada Pension Plan Investment Board

Jennifer is responsible for leading the Information Services team at CPP Investment Board with a focus on the company's systems strategy, implementations and operations. Jennifer has more than 30 years of experience in information technology, most recently as Head of Information Technology Outsourcing for Citigroup Fund Services in Canada. She has held other senior positions including Chief Operating Officer at Merrill Lynch HSBC Canada, Chief Information Officer at Merrill Lynch Canada and Vice President of Information Services at Canadian Tire. Jennifer holds an Honours Bachelor of Science degree in Mathematics and Computer Science from Queen's University. She is the former Chair of the Council of Chief Information Officers for the Conference Board of Canada, and was previously a member of the Queen's University MBA for Science and Technology and the Ontario IT Strategy Advisory Boards. She is also past Chair of the Board, Havergal College, a private girls' school in Toronto.

Garry Wright

Partner, ReferenceDataFactory

Garry is a senior consultant responsible for data management technology, business processes and architecture (rules, comparative knowledge, mapping, attributes, workflow, etc.). Garry is an executive IT manager with 20 years of experience in designing, implementing and supporting systems in the financial services industry. Garry is considered a subject matter expert in the reference data arena, EDM and EAI with detailed business knowledge in front, middle and back office systems, extensive & successful history advising and building strong relationships with Wall Street users, clients, vendors and developers to deliver successful world-class data management solutions. Prior to working with LakeFront, Garry provided executive level consulting to Bank of America Securities. Prior to Bank of America, Garry lead product management for reference data products at Financial Technologies International (now GoldenSource).

SPONSOR PROFILE



A-Team Group provides the global community of IT and data professionals in financial markets with the business intelligence they need to excel in their roles. Through its unique mix of media channels – including print publications, online services and research reports, as well as its customized research and strategic marketing services – A-Team helps buyers and sellers of technology and data to understand the strategic and logistical issues involved in technology deployments across the financial services enterprise. Meanwhile, suppliers benefit from getting their message to A-Team's loyal community of readers and customers. More information is available at www.a-teamgroup.com.