PI Financial | *Portfolio Management Team*

Bert Quattrociocchi | CFA
Managing Director, Discretionary Asset Management & Portfolio Strategy
Senior Vice President and Director

Phone: 604.664.2925
Fax: 604.664.3607
bjq@pifinancial.com

Portfolio Manager – PI Financial Managed Portfolios

Mr. Bert Quattrociocchi is the Managing Director of Discretionary Asset Management and Portfolio Strategy.

Bert is the lead portfolio manager for PI Financial's 8 in-house discretionary managed portfolios.

Bert has been managing investment portfolios for over 35 years and is a Senior Portfolio Manager registered across Canada.

Mr. Quattrociocchi joined PI Financial in 1990 and has been a major contributor to the firm's growth and success. Bert is a Senior Vice President, and member of PI Financial's Executive Committee.

PI Financial is one of Canada's leading full service independent investment firms with over 300 employees and offices across Canada.

Bert's executive management background includes: Previous Head of the Private Client Division and the Capital Markets Division - which he established and grew to 40 professionals located in Vancouver, Calgary and Toronto.

Bert has held a wide range of investment industry positions in portfolio management, equity research, institutional and private client sales, and investment banking.

Mr. Quattrociocchi holds an Economics Degree from the University of British Columbia and holds the Chartered Financial Analyst (CFA) designation.

Bert has made a significant contribution to the investment industry: Past Chairman of the BC Region of the Investment Industry Association of Canada (IIAC); Past Chairman of the Pacific District Council of the Investment Industry Regulatory Organization of Canada (IIROC); Past Member of the National Advisory Council and National Retail Sales Committee of IIROC; Past President of the Vancouver Society of Financial Analysts.

Han Li | MA CFA CFP

Associate Portfolio Administration and Analyst

Phone: 416.883.9047
Fax: 416.789.2401
hli@pifinancial.com

Analyst – Portfolio Strategy

Mr. Han Li joined PI Financial in 2023 and is responsible for supporting the team with macroeconomic analysis used to the portfolio strategy and asset allocation of PI Financial’s managed investment portfolios. He also responsible for developing and maintaining PI proprietary quantitative models used for industry and equity selection. Han is a member of the Portfolio Strategy research team.

Han has over 8 years of experience working as a portfolio analyst and investment analyst for two national financial institutions within their wealth management departments.

Han holds a Bachelor of Economics degree from University of Alberta and a Master’s in Economics from McMaster University. Han has held the CFP designation since 2018 and has been a CFA Charterholder since 2022. Han lectures Python part-time at the University of Toronto RiskLab.

Christopher Yee | BBA CFA

Associate Wealth Management Administrator and Analyst

Phone: 604.664.3682
Fax: 604.664.2649
cyee@pifinancial.com

Analyst – Portfolio Strategy

Mr. Christopher Yee joined PI Financial in early 2023 and is responsible for providing portfolio analysis and administration. He also provides the team and PI investment professionals with critical market and corporate news and information flow. He assists in the statistical analysis of PI Financial’s in-house model portfolios and the generation of investment strategy material. Christopher is a member of PI Portfolio Strategy team.

Chris has over 6 years of experience in the financial services industry, working for the two of the leading Canadian investment managers.

Chris holds a Bachelor of Business Administration (Finance and Economics Joint Major) and has been a CFA Charterholder since 2022.