Passive Strategies for Actively Managing Risk

Victoria Bogner
CEO
Affinity Financial Advisors

Victoria is a partner and the CEO of Affinity Financial Advisors. She works with high net worth clients that range from university presidents to Hollywood celebrities. An Accredited Investment Fiduciary® and a Certified Financial Planner®, she is also a Chartered Financial Analyst Charterholder. The CFA Institute serves to lead the investment profession globally by promoting the highest standards of ethics, education, and professional excellence.

Along with being partner and CEO, Victoria is also the Chief Investment Officer. She leads the Investment Committee to plot the approach to asset management and also performs stock market analysis for investment strategies.

Victoria is a 2018 40 Under 40 Honoree* by InvestmentNews, the leading news source for financial advisers. The 40 Under 40 project is designed to reveal top young professionals who do remarkable work in the financial industry. To be considered, she met their four criteria of accomplishment, contribution, leadership, and promise.

She has been featured in the Wall Street Journal, New York Times, Forbes, Associated Press, US News & World Report, ABC News, Bloomberg, and other top publications about work-life balance as the CEO of a multi-million dollar business and being a working mom.

She and her husband Luke keep active with their two children.

Phillip Brzenk, CFA
Senior Director, Strategy & Volatility Indices
S&P Dow Jones Indices

Phillip Brzenk is Senior Director, Strategy & Volatility Indices at S&P Dow Jones Indices (S&P DJI). His field focuses on alternate beta strategies, including factor-based indices, dividends, and volatility, as well as quantitative, thematic, and asset-allocation strategies. In his role, Phillip works closely with the sales, channel, marketing, and research departments to bring new ideas to market.

Prior to his current role, Phillip was a Senior Director in the Global Research & Design team, where he was responsible for conceptualization, research, and design of core and quantitative equity, volatility, multi-asset, alternative data, and thematic indices. Phillip has held various roles in other departments at S&P DJI including strategy index management, custom, and development.

Phillip is a CFA charterholder and a member of the CFA Society New York. He has a bachelor's degree in management with a concentration in finance from the Georgia Institute of Technology.

Akhil Lodha

CEO
StratiFi

Akhil is the co-founder & CEO of StratiFi where he drives the strategic vision of the company. StratiFi is a powerful portfolio risk analysis and compliance technology for financial advisors. StratiFi empowers financial advisors to use sophisticated risk scoring technology to analyze and visualize risk on a simple 1 to 10 scale and see if the portfolio's risk truly aligns with the client's risk tolerance. StratiFi has been voted as the best risk-tolerance and client-profiling technology for financial advisors.

Prior to StratiFi, Akhil was the co-founder of Sliced Investing, the first online hedge fund investing platform for individuals. Akhil was also a core member of the Investment Products and Analytics team at Motif Investing and he started his career as a quantitative trader on an automated options market making desk at Citigroup in New York. Akhil has deep expertise in option strategies, electronic trading, quantitative trading strategies and machine learning. He holds a B.Tech. in Computer Science and Engineering from IIT Bombay and an MS in Computational Finance from Carnegie Mellon University.