S&P Dow Jones Indices

A Division of S&P Global

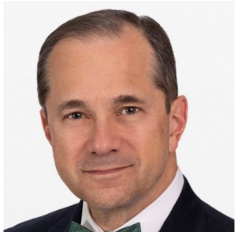
Unlocking the Power of Passive Investing with SPIVA

Rick Ferri, CFA
Founder and CEO
Ferri Investment Solutions

Rick has worked in the investment industry for about 35 years and has embraced a low-fee Bogleheads philosophy for more than 25 years. He is the founder and CEO of Ferri Investment Solutions where he advises do-it-yourself individuals for fix-rate and hourly fees. Rick started his career in 1989 as a Wall Street broker, and 1999, founded one of the nation’s first low-fee portfolio management companies where he grew assets to over $1.5 billion. In 2017, the firm was purchased by a private equity investor.

Rick has published extensively on the benefits of low-cost investing, including several books on index funds, ETFs, and asset allocation. He has also written for Forbes and The Wall Street Journal and is the creator and host of the “Bogleheads On Investing” podcast, a program sponsored by the John C. Bogle Center for Financial Literacy, a 501(C)3 organization.

Rick graduated from the University of Rhode Island with a Bachelor of Science Degree in Business Administration and from Walsh College with a Master of Science Degree in Finance. He became a CFA charterholder in 1994. Rick is also a retired Marine Corps officer, and flew jet fighters off aircraft carriers.



Craig Lazzara, CFA
Managing Director, Core Product Management
S&P Dow Jones Indices

Craig Lazzara is a Managing Director in the Core Product Management group at S&P Dow Jones Indices (S&P DJI). His responsibilities focus on providing thought leadership and educational outreach for S&P DJI’s core, alternative beta, and style indices globally. Prior to assuming his current role, Craig founded the Index Investment Strategy team, which provides research and commentary across the S&P DJI product set, with particular emphasis on the active vs. passive debate, factor indices, and index dynamics. He previously served as product manager for S&P DJI’s U.S. equity and real estate indices. These include the S&P 500® and the S&P CoreLogic Case-Shiller Home Price Indices, two of the most widely tracked benchmarks in the world.

Prior to joining S&P Indices in 2009, Craig was a managing director of Abacus Analytics, a quantitative consulting firm serving the brokerage and investment management communities. He previously directed marketing and client service for ETF Advisors and Salomon Smith Barney’s Global Equity Index Group, as well as for the Equity Portfolio Analysis group at Salomon Brothers. Earlier, Craig served as chief investment officer of Centurion Capital Management and Vantage Global Advisors, as a managing director of TSA Capital Management, and as a vice president and portfolio manager for Mellon Bank and T. Rowe Price Associates.

A Chartered Financial Analyst, Craig is a graduate of Princeton University and Harvard Business School.

Todd Rosenbluth
Head of Research
VettaFi

Todd Rosenbluth is the Head of Research at VettaFi. In this role, Todd is responsible for overseeing the firm’s research into ETFs, product trends, and advisor behavior. Prior to joining VettaFi, he was leading CFRA’s fund research business and worked in a similar capacity as an equity analyst at S&P Global. Todd has frequently been quoted in print media outlets, including Barron’s, Bloomberg, Financial Times, Investment News and the Wall Street Journal, and video outlets, such as CNBC, Fox Business, TD Ameritrade, and Yahoo Finance. He also is a regular speaker at ETF industry conferences. In his spare time, Todd enjoys cheering on the Michigan Wolverines and coaching his son to baseball and basketball victories.