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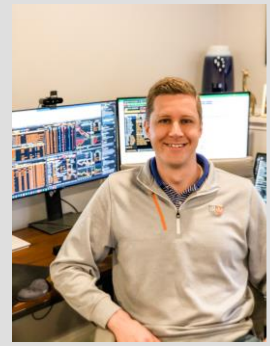
TWO MINUTES WITH... TUCKER ROTHMANN, CFA

PORTFOLIO MANAGER



Describe your career path.

Before joining IR+M, I worked as an Investment Analyst at a consulting firm. I was interested in deepening my fixed income knowledge and was thrilled to have the chance to join IR+M. I started my IR+M experience on the Client Service Team, before transitioning to the Investment Product Management Team (IPMT). While working on IPMT, I had the opportunity to construct model portfolios with our Investment Team and realized that was what I wanted to do. I seized the opportunity to move to our Portfolio Management Team as an Analyst. Under the guidance of our Senior Portfolio Managers, I worked on a subset of portfolios (including our LDI-focused portfolios), learning how to take guidelines and restrictions into account when building a diversified portfolio. I've since taken on more responsibility and become a Portfolio Manager.

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What trends are you looking at in your sectors?

I'm watching how corporate pension plans react to reaching funded status milestones over the previous year. Widespread de-risking activity could support spreads to a degree, especially in the long end (more on this thought from my colleague, Theresa Roy). Some plans may also explore more tailored investment solutions as funded status levels climb and hedging portfolios become larger components of overall plan assets.

What do you love about your job?

Managing portfolios is like working on a large puzzle. When assembling a 1,000-piece landscape picture, it's important to take a step back every so often to see if the pieces are in the right place. Similarly, when managing a portfolio, it's vital to regularly evaluate if it has the proper risk level or the right sector exposures. Working on a puzzle is better with friends, so gathering ideas from across different teams, bubbling them up to senior managers, and seeing those ideas make their way into our portfolios is so rewarding. Every day is exciting and different, and I feel like I'm constantly learning something new.

Get to know Tucker

What is something that people might be surprised by?

I was a French-Business double major in college, and as a result, am proficient in the language. I'm fascinated with French culture and hope to travel to France when the pandemic ends. I also play the guitar, which has been a great outlet for me.

What do you do in your free time?

I love reading biographies. They instantly transport me to a different time, place, or culture. Some of my recent reads include biographies on George Washington and Walt Disney.

Why did you choose IR+M?

When I was thinking about my career path, I knew I wanted to work at a smaller and privately-owned company. I was interested in forging close bonds with my colleagues and our clients. I was familiar with IR+M due to my consulting work, so I jumped on the opportunity to apply. During the interview process, it was immediately obvious that IR+M was special and everything I wanted. Even though we haven't been in the office five days a week since the pandemic started, we all make sure we stay connected and check in with each other – that's what makes IR+M so great.