



Thomas S. Simon, CFA, FRM

Senior Managing Director, Partner, and Portfolio Manager
Wellington Management

Tom Simon leads Wellington's Manager Research and Fundamental Factor Platform investment teams. These teams conduct original research on factor investing, risk management, manager evaluation, analytical systems, and portfolio construction.

Mr. Simon and the team members are portfolio managers for multi-manager and factor solutions offered by Wellington, including U.S., global, non-U.S., regional, and hedge fund strategies. He also spearheads analyzing key trends and factor biases across equity markets and plays an integral role in Wellington's technology and fiduciary oversight processes, serving on a number of investment review and risk advisory committees, including Equity Review Group I.

Prior to joining the firm in 2009, Mr. Simon spent nine years at FactSet Research Systems Inc. (2001 – 2009) as a quantitative analytics specialist (2004 – 2009), strategic consultant (2003 – 2004), and consultant (2001 – 2003).

Mr. Simon earned his B.B.A. in finance and economics from the University of Wisconsin-Madison (2001). Additionally, he holds the Chartered Financial Analyst® (CFA®) and Financial Risk Manager (FRM) designations.