

## **Thomas S. Simon, CFA, FRM**

Senior Managing Director, Partner, and Portfolio Manager  
Wellington Management

Tom Simon is a portfolio manager of the Virtus WMC Global Factors Opportunities ETF (NYSE Arca: VGFO), which is subadvised by Wellington Management®.

As a portfolio manager, Mr. Simon helps to lead 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. Their mission is to be a trusted partner to the firm's clients through independent manager and factor research, creating innovative strategies to solve client challenges, advising clients on opportunities and risks in their portfolios, or directly generating investment performance through solutions to meet client-directed objectives.

Mr. Simon and the team members are portfolio managers for multi-manager and factor solutions offered by the firm, 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 our 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), where he served as vice president. He also worked at Quantitative Analytics (2007 – 2009) and served as a quantitative specialist (2003 – 2007) and a consultant (2001 – 2003).

Mr. Simon received 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.

**Please consider the Fund's objectives, risks, charges, and expenses before investing. Contact us at 1.800.243.4361 or visit [www.virtus.com](http://www.virtus.com) for a prospectus, which contains this and other information about the Fund. Read the prospectus carefully before investing.**