



Joann L. Kayser

Partner & Director, Operations

Investment-related Experience: 26 years

Years with Firm: 21 years

As Director, Operations and a founding member of LSIA, Joann oversees the firm's operations and trading, striving to give every client an exceptional experience with our firm. She also oversees the administration of LSIA's Milwaukee office and is directly responsible for daily office operations, administrative staff supervision, composite administration and equity team administrative support. Joann also leads LSIA's Trading Oversight Committee, a group established to review and monitor the firm's trading practices.

Prior to starting LSIA, Joann advanced through positions of increased responsibility with Loomis, Sayles & Company, LP. In 1997, she was a Marketing Coordinator, providing marketing/administrative support through the timely completion of Request For Proposals, questionnaires, new business presentations and client correspondence. In 2000, she was promoted to Office Administrator for the firm's Milwaukee office.

Before joining Loomis Sayles, Joann served a dual role as Executive Assistant to both the President and Vice President of Operations for Firststar Investment Research and Management Company, a division of US Bancorp (1994-1997). In this role, Joann prepared financial and board reports, Request for Proposals, questionnaires, marketing literature, new business presentations and state investment advisor registrations. She began her career with Firststar as a Portfolio Assistant with Firststar Trust Company (1992-1994), providing portfolio management support through client correspondence, account reconciliation and client cash addition/withdrawals processing.

Years with Firm include tenure at LSIA; Portfolio Management Partners (formerly a division of Natixis Asset Management Advisors, LP; now Ostrum Asset Management); and Loomis, Sayles & Company, LP. Both Loomis, Sayles & Company, LP and Ostrum Asset Management are affiliates of Natixis Investment Managers.