



Laurie J. Kuchler

Executive Assistant

Investment-related Experience: 29 years

Years with Firm: 24 years

As an Executive Assistant with LSIA, Laurie is responsible for client portfolio administration within our firm's Milwaukee office. In this critical role, she handles a variety of operational and administrative tasks, including client portfolio analysis and account reconciliation, client report and meeting book preparation, document retention and recordkeeping and client relationship management database maintenance, among many others.

Working closely with LSIA's Chief Investment Officer, Mark Shank, Laurie is part of a collaborative team that is committed to serving both individual and institutional clients with the highest standard of care. Her role involves communicating with clients, as needed, and often acting as a point of contact between Mark and the client custodians to ensure funds are properly handled in accordance with client directives. Laurie also assists Mark with client correspondence on a variety of matters from market updates to securities transactions.

Prior to joining LSIA, Laurie worked alongside Mark as an Executive Assistant with Portfolio Management Partners, a division of Natixis Asset Management Advisors LP (2006-2008) and Loomis, Sayles & Company, LP (1994-2006). Before joining Loomis Sayles, Laurie served as an Administrative Assistant for a venture capital firm, a corporate finance organization and an investment consultant (1989-1994) and as a Legal Assistant for a Milwaukee-based law firm (1986-1989).

Laurie's passion for helping others is woven into the fabric of her professional and personal life. She is currently a Haitian missionary and the President of the Wisconsin Conference United Methodist Women's Group and was previously a Trustee/Secretary for St. Anne's Church (2000-2015).

EDUCATION AND ACCREDITATIONS

Certification

- Milwaukee Business Training Institute

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.