

SPEAKER BIOGRAPHIES

## Jamie Dimon, Chairman & Chief Executive Officer



Jamie Dimon is Chairman of the Board and Chief Executive Officer of JPMorgan Chase & Co., a global financial services firm with assets of \$2.4 trillion and operations worldwide. The Firm is a leader in investment banking, financial services for consumers, small business, commercial banking, financial transaction processing and asset management.

Dimon became CEO on January 1, 2006 and one year later also became Chairman of the Board. He was named President and Chief Operating Officer upon the company's merger with Bank One Corporation on July 1, 2004. Dimon joined Bank One as Chairman and CEO in 2000.

Dimon began his career at American Express Company. Next, he served as Chief Financial Officer and then President at Commercial Credit, which made numerous acquisitions and divestitures, including acquiring Primerica Corporation in 1987 and The Travelers Corporation in 1993. Dimon served as President and Chief Operating Officer of Travelers from 1990 through 1998 while concurrently serving as Chief Operating Officer of its Smith Barney Inc. subsidiary before becoming co-Chairman and Co-CEO of the combined brokerage following the 1997 merger of Smith Barney and Salomon Brothers. In 1998, Dimon was named President of Citigroup Inc., the global financial services company formed by the combination of Travelers Group and Citicorp.

Dimon earned his bachelors degree from Tufts University and holds an MBA from Harvard Business School.

## Marianne Lake, Chief Financial Officer



Marianne Lake is the Chief Financial Officer of JPMorgan Chase & Co. and a member of the Firm's Operating Committee.

Lake previously was the Chief Financial Officer of Consumer & Community Banking at JPMorgan Chase since 2009. Consumer & Community Banking has ~130,000 employees serving 50 million customers with banking, lending, credit cards, auto finance, payments, mortgages, wealth management and advisory services.

From 2007 to 2009, Lake served as the Investment Bank's Global Controller. From 2004 to 2007, Lake was in the Corporate Finance group managing global financial infrastructure and control programs.

Prior to 2004, Lake worked at both Chase and J.P. Morgan in London. At Chase, Lake was the Senior Financial Officer in the UK and at J.P. Morgan she was the CFO for the Credit Trading business. Lake started her career as a chartered accountant at PricewaterhouseCoopers in the London and Sydney offices.

Lake received a Bachelor of Science degree in Physics from Reading University in the United Kingdom. She is on the Board of Directors for the JPMorgan Chase & Co. Foundation as well as the New York City Ballet.

## Gordon Smith, Chief Executive Officer – Consumer & Community Banking



Gordon Smith is the CEO of Consumer & Community Banking at Chase.

The business has roughly 130,000 employees serving 66 million consumers and 4 million small businesses. The business is a leading provider of banking, credit cards, auto finance, payments, mortgages and investment advice. He reports to JPMorgan Chase Chairman and CEO Jamie Dimon and is a member of the Firm's Operating Committee.

Chase has more than 5,400 bank branches (#2 branch network) and 18,000 ATMs (#1) across 23 states in the U.S. Chase is the #1 U.S. credit card issuer and the #2 mortgage originator and servicer in the country. Chase.com is the most-visited banking portal in America with 39 million active online users, including 23 million mobile users.

Smith joined Chase in June 2007. He served as CEO of the Card, Merchant Services and Auto Finance business before taking on his current role in 2012.

Before joining Chase, he spent more than 25 years at American Express, where he led and managed several businesses, including the U.S. Domestic Consumer Card Business. From August 2005 until June 2007, he was President of the Global Commercial Card business, with responsibility for corporate cards and corporate purchasing cards across more than 30 countries.

Smith serves on the Board of Directors for both Choice Hotels International Inc. and Nordstrom Inc. He is also on the Board of the International Rescue Committee, which responds to the world's worst humanitarian crises and helps people to survive and rebuild their lives. He holds a master's degree from the Thunderbird School of Global Management.

He is married with two grown children and lives in New Jersey.

## Mary Callahan Erdoes, Chief Executive Officer – Asset Management



Mary Callahan Erdoes is Chief Executive Officer of J.P. Morgan's Asset Management division, a global leader in investment management and private banking with \$2.4 trillion in client assets. She is also a member of JPMorgan Chase & Co.'s Operating Committee.

Ms. Erdoes joined J.P. Morgan in 1996 from Meredith, Martin & Kaye, a fixed income specialty advisory firm. Previously, she worked at Bankers Trust in corporate finance, merchant banking and high yield debt underwriting.

Ms. Erdoes is a graduate of Georgetown University (B.S., Mathematics) and Harvard Business School (M.B.A.).

She is a board member of the U.S. Fund for UNICEF and the U.S.-China Business Council, and serves on the Federal Reserve Bank of New York's Investor Advisory Committee on Financial Markets. Bloomberg Markets magazine named her the World's Most Influential Money Manager for 2013. Forbes and Fortune magazines also consistently rank her as one of the World's Most Powerful Women. Ms. Erdoes lives in New York City with her husband and three daughters.

## Douglas Petno, Chief Executive Officer – Commercial Banking



Doug Petno is the Chief Executive Officer of Commercial Banking, one of the Firm's four lines of business. He reports to JPMorgan Chase Chairman and CEO Jamie Dimon and is a member of the Firm's Operating Committee.

Commercial Banking has more than 9,000 professionals located in 120 locations across the U.S. and 19 major international cities. Its team members are entrenched in the communities and dedicated to the clients they serve.

With a focus on its local presence, Commercial Banking delivers industry leading capabilities and comprehensive financial solutions from across the Firm while never compromising on service or customer experience. The business serves more than 19,000 clients nationally, including mid-sized businesses and corporations, government entities and not-for-profit organizations and more than 36,000 real estate investors/owners.

Petno has more than 25 years of experience at the Firm, most recently as global head of J.P. Morgan's Natural Resources Investment Banking Group, where he oversaw client coverage for Oil & Gas, Power & Utilities, Chemicals, Metals & Mining, Building Products, and Paper & Packaging. He joined Commercial Banking in 2010 as Chief Operating Officer and then became the Chief Executive Officer in 2012.

Passionate about the environment, Petno currently serves on the Advisory Board for NatureVest, a new initiative at The Nature Conservancy. He received a Bachelor of Arts degree in Biology from Wabash College and holds a Master of Business Administration from the University of Rochester's Simon School of Business and was awarded their Distinguished Alumnus Award in 2013.

## Daniel Pinto, Chief Executive Officer – Corporate & Investment Bank



Daniel Pinto is CEO of J.P. Morgan's Corporate & Investment Bank, an industry leader in investment banking, trading markets and investor services such as cash management, clearing and prime brokerage. He is a member of the firm's Operating Committee, and also CEO of the firm's Europe, the Middle East and Africa (EMEA) region.

Daniel has spent his career at J.P. Morgan and its predecessor companies. He began his career at Manufacturers Hanover in 1983 as a financial analyst and foreign exchange trader in Buenos Aires. In 1992, he was appointed head of Sales for Chemical Bank in Buenos Aires, responsible for clients in Argentina, Uruguay and Paraguay. Shortly after, he became head trader and Treasurer of Chemical Bank in Mexico. Daniel moved to London in 1996 to oversee local markets in Eastern Europe, the Middle East, Africa and Asia for Chase Manhattan.

In 2002, Daniel became head of the markets side of J.P. Morgan's emerging markets business, and was made global head of Emerging Markets in early 2006. He was given added responsibility for the Global Credit Trading & Syndicate business in early 2008. In 2009, he was made co-head of Global Fixed Income for the Investment Bank before becoming sole head of the group in 2012. He was also made co-CEO of the Corporate & Investment Bank in 2012, and became sole CEO in 2014.

Daniel holds a bachelor's degree in Public Accounting and Business Administration from Universidad Nacional de Lomas de Zamora in Buenos Aires.