

STACEY AGRETELIS, CFA

Finance & Investments / Compliance / Sustainability

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SUMMARY

Investment executive with extensive portfolio management and financial analysis expertise. Proven track record in fund management, including creation of Metals & Mining Fund outperforming benchmarks by 60%. Deep experience in credit analysis, financial modeling, and deal execution across public and private markets. Strong history of aligning investment strategies with regulatory requirements while delivering above-market returns. Expertise in ESG integration and sustainable investing, managing large portfolios while maintaining robust risk management protocols.

- Investment / Portfolio Management
- Fixed Income / Equities / Alternative Investments
- Compliance – SEC / Risk / Regulatory Framework
- ESG Integration / Sustainable Finance
- TCFD / CDP / PRI / CSRD Reporting
- Leadership – Collaboration /Communication/Strategy

PROFESSIONAL EXPERIENCE

HEAD OF INVESTMENTS SUSTAINABILITY ♦ Aflac Global Investments ♦ New York, NY ♦ 2022 – 2024

- **Sustainable Investment Strategy & Execution:**
 - Introduced economic sustainable investments aligned with SDGs, focusing on climate mitigation and social impact
 - Structured ESG investment framework integrating offset strategies and impact metrics
- **Risk Management & Regulatory Compliance:**
 - Formulated climate risk management system assessing transition risks across \$120B+ portfolio
 - Structured regulatory reporting framework aligned with TCFD, CDP and PRI requirements, covering governance, strategy and metrics
- **Climate Strategy Leadership:**
 - Directed development of Net Zero transition plan for \$120B+ global investment portfolio
 - Designed sector-specific Net Zero transition strategies, maintaining investment returns
- **Strategic Leadership & Stakeholder Management:**
 - Advised C-suite executives on emerging ESG regulations and market trends
 - Established cross-functional governance structure for climate initiatives

HEAD OF ESG, GENERAL ACCOUNT ♦ Manulife Financial Corporation ♦ Boston, MA ♦ 2020 – 2022

- **Climate Strategy & ESG Integration:**
 - Led ESG strategy for C\$400B+ General Account portfolio
 - Created proprietary ESG scoring methodology, capturing critical sustainability indicators
 - Integrated ESG factors into credit analysis, resulting in enhanced risk assessment
- **GHG Emissions Analysis & Target Setting:**
 - Pioneered first comprehensive GHG emissions baseline across multi-asset portfolio
 - Researched science-based emissions reduction targets aligned with Net Zero 2050 commitment
 - Implemented portfolio-wide emissions tracking system
- **Strategic Leadership & Training:**
 - Launched global ESG education program, reaching 100+ investment professionals
 - Established cross-functional working groups across investment teams

MANAGING DIRECTOR, INVESTMENTS ♦ Manulife Financial Corporation ♦ Boston, MA ♦ 1995 – 2020

- **Investment & Portfolio Management:**
 - Managed \$3B+ portfolio, annually underwriting \$500M+ in new investments
 - Created Metals & Mining Public Equity Fund (C\$1B), delivering 60% higher returns than MSCI Index

- **Regulatory Compliance & Risk Management:**
 - Aligned investment approach with SEC and internal governance standards
 - Conducted regular compliance audit and comprehensive risk assessment on portfolio
 - Anticipated potential compliance challenges and established controls to minimize regulatory risks
- **Corporate Analysis & Research:**
 - Conducted comprehensive fundamental analysis across sectors
 - Designed financial models forecasting credit metrics and investment creditworthiness
 - Analyzed complex financial structures including balance sheets, cash flows, and debt configurations
 - Developed scenario analysis incorporating macro factors
- **Strategic Due Diligence:**
 - Evaluated executive leadership capabilities and track record
 - Scrutinized production efficiency metrics, capacity utilization, and environmental compliance
 - Performed competitive landscape analysis and forecasted indicators of future market position
 - Examined in-depth financial health, including cash flow, working capital, capital structure, covenant compliance, and off-balance sheet exposure
 - Structured industry analysis framework covering regulations, technology, and ESG factors
- **Investment Execution & Risk Management:**
 - Structured critical debt agreements, protecting firm's financial interests
 - Executed complex investment strategies across public and private markets
 - Facilitated cross-functional collaboration across teams
 - Tracked covenant compliance across portfolio
 - Created quarterly risk assessment reports
- **Leadership Achievements:**
 - Earned Star of Excellence Investment Division Team Award (2017)
 - Established robust investment evaluation frameworks
 - Prepared high-impact investment presentations for senior management
 - Consistently delivered strong investment performance
 - Designed and led analyst training programs

EDUCATION

M.B.A., Northeastern University (Finance)

B.S., Northeastern University (Finance, Marketing)

PROFESSIONAL AFFILIATIONS

CFA Society Boston

COMMUNITY ENGAGEMENT

Assistant Treasurer and Board Member, Hellenic Women's Club, 2022 – Present