



Chicago QWAFEFW Meeting

January 30, 2007

“Innovative Factors in Equity Modeling”

Speaker Biographies

Mr. Rawley Thomas

President, LifeCycle Returns, Inc.

Rawley Thomas is President of LifeCycle Returns, Inc. (LCRT) in St. Charles, Illinois. He served as Assistant Treasurer of SuperValu Stores, joined Callard, Madden in 1981, co-founded HOLT Planning in 1985, and directed Value Management research for The Boston Consulting Group for eleven years. Credit Suisse First Boston acquired the successor to HOLT Planning, HOLT Value, in early 2002. Mr. Thomas is VP Practitioner Services for the Financial Management Association International (FMA) and is Chairman of the FMA Practitioner Research Committee. Currently, he serves on the Northern Illinois Accountancy Board and the Education Group of the Investment Analyst Society of Chicago. Mr. Thomas can be reached at Rawley@LCRT.com. LifeCycle Returns supports investment funds, consulting firms and investment banks with process consulting and licensed platforms to create world-class capabilities in their use of Value Management principles.

Mr. Carson Boneck

Sr. Quantitative Analyst, Quantitative Services Group (QSG)

Carson Boneck, CFA joined QSG November 2004. He has significant expertise in factor-based research and quantitative portfolio modeling. He comes to QSG from Chicago Investment Analytics where he was a Quantitative Analyst. Prior to CIA, Mr. Boneck spent over five years at a boutique investment consultancy group specializing in quantitative and fundamental stock research. He received his bachelors as a triple major in Finance, International Business & Spanish from the Indiana University. He also is the former Chairman of the Candidate Services Advisory Group of the Investment Analyst Society of Chicago and a CFA charterholder.

Mr. Jason Hans

Sr. Quantitative Analyst, Quantitative Services Group (QSG)

Jason Hans joined QSG in June of 2003. Mr. Hans has a focused background in quantitative analysis and fundamental equity research. He is the manager of QSG’s factor library services, containing over 400+ domestic stock selection signals, and serves as a lead in QSG most important research and client projects. He received his MBA from the Mendoza College of Business at the University of Notre Dame and his BS in Business and a minor in Physics from Miami University. His previous finance experience included positions at American Express Financial Advisors.

Special thanks to our host Ms. Melissa Van Hees, BRI Partners, LLC

Moderator: Mr. Keith Black, Stuart Graduate School of Business at the Illinois Institute of Technology

Chicago QWAFEFW Steering Committee members (in alphabetical order):

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- Mr. David O'Brochta, UBS
- Ms. Hilary Till, Premia Capital Management, L.L.C.; and Co-Editor of Intelligent Commodity Investing
- Ms. Melissa Van Hees, BRI Partners, L.L.C.

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Prepared by Katherine Farren, Premia Capital Management, LLC.