

Leading Ladies: Conversations With My Former Self

Moderator: **Michal Levy, CFA**



Michal Levy, CFA, Senior Vice President and Head of Venerable Advisers, is responsible for the day-to-day oversight of all functional activities, including fund design, strategy, operations, and administration. She also serves as CEO and President of the Venerable Variable Insurance Trust. Previously, Michal served as President and COO of Equitable Investment Management (EIM). She joined Equitable in 2011 and held several positions before being named President in 2021. During her tenure, Michal was responsible for managing over \$100 billion in AUM and supported numerous cross-functional initiatives, including Equitable's reinsurance transaction with Venerable, and also spearheaded the launch of EIM's retail mutual fund complex in 2014 for which she served as Trust president.

Michal spent more than 7 years with Duff & Phelps, formerly Standard & Poor's Corporate Value Consulting, providing advisory services for private equity mergers and acquisitions transactions, including financial and accounting due diligence and portfolio valuations. Michal began her career as a performance analyst and customer service representative at Putnam Investments. She is a graduate of the University of Maryland, a CFA® charterholder, and holds the FINRA Series 6 and 26 licenses.

Panelist: **Adrea Scaramucci**



Adrea Scaramucci is Chief Compliance Officer of Venerable Advisers and responsible for oversight of compliance policies, procedures, and code of ethics, as well as monitoring for, analyzing, and interpreting proposed and current rules, regulations, and interpretations that could impact the investment adviser. Adrea

also leads all efforts to ensure compliance with investment guidelines, oversees third party relationships involving Venerable Advisers, and prepares and submits all regulatory filings and reports.

Prior to joining Venerable Advisers, Adrea served as Senior Principal Consultant and Outsourced CCO for the ACA Group. During her tenure, she was a trusted advisor to executive leadership and led a team of compliance professionals providing services to investment advisers managing registered investment companies, private debt funds, CLOs, private equity funds, hedge funds, and separately managed accounts for institutional clients across multiple strategies and asset classes. Prior to ACA Global, Adrea was Chief Compliance Officer of Drexel Morgan Capital Advisers. Earlier in her career, Adrea worked at Morgan Stanley Investment Management, serving as Vice President of Compliance.

Adrea is a graduate of Rosemont College.

Panelist: Kristina Magolis



Kristina Magolis is General Counsel of Venerable Advisers and provides legal and regulatory guidance and subject matter expertise for legal matters relating to all aspects of the investment adviser. She also serves as the Secretary of the Venerable Variable Insurance Trust, the variable insurance mutual fund company managed by Venerable Advisers.

Prior to joining Venerable Advisers, Kristina served as Associate General Counsel for Equitable Investment Management (EIM). There, she was responsible for the legal and regulatory oversight of both retail and insurance mutual funds, including investment sub-advisers, and model portfolios and collaborated closely with leadership on business strategy, product development and corporate governance. Prior to EIM, Kristina was in-house counsel at Morgan Stanley Investment Management (MSIM) where she was responsible for the legal and regulatory oversight of retail and institutional product offerings including mutual funds, private funds and separately managed accounts. While at MSIM, she also worked closely with MSIM Legal's Chief Operating Officer on strategy, operations, and personnel development. She began her legal career at Equinox Funds which offered managed futures mutual funds and private funds.

Kristina is admitted to the bar in the states of New Jersey, New York, and Pennsylvania, holds a J.D. from Roger Williams University School of Law, and a B.A. in Political Science from The Pennsylvania State University.



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