

The Women of Bailard

Bailard was founded in 1969, and has always had an open culture and a tradition of treating colleagues more like family than coworkers. We think our average employee tenure of 13 years and representation of 10 countries among our 67 employees reflects this. As of this writing, Bailard's full-time employee base consists of 39% women. Bailard is proud to be majority employee-owned, with 39% female ownership. The firm has a long tradition of focusing on gender pay equity, and women represent 38% of Vice Presidents and above. Peter and I joined Bailard in 1985 and 1994, respectively, and we are proud of Bailard's history and so excited about the next generation of women rising in the firm.

Inside we take a moment to feature some of the Bailard women who have assisted the individuals, families and institutions we have served for generations, helped advance the Bay Area finance industry and causes, and manage our investment strategies.



Peter M. Hill
Chairman and
Chief Executive Officer
Bailard, Inc.



Sonya Thadhani, CFA
Executive Vice President
Chief Operating Officer,
Chief Risk Officer,
Bailard, Inc.



Did you know¹...

46%

of wealth management
staff are women

39%

women owned

39%

of full-time employees
are women

38%

of staff VP and above
are women



Dana M. Scheer, CFA, CFP®

Senior Vice President, Investment Counselor
26 years' investment experience, 24 years with firm

Helping drive client base growth

Dana helped spearhead the initiative for Bailard to be a part of the highly-selective Schwab Advisor Network in 2010. The relationship, which Dana is still at the forefront of today, has been a significant growth source for the firm's wealth management group.

Making history

Sue was the first female president of the CFA Society of San Francisco. Today, Sue sits on Bailard Wealth Management's Sustainable, Responsible and Impact Investing committee.



Sue Ramar, CFA

Senior Vice President, Investment Counselor
37 years' investment experience, 1 year with firm

Sonya Thadhani, CFA



Executive Vice President
Chief Operating Officer, Chief Risk Officer
24 years' investment experience, 24 years with firm

Woman rising

Sonya began at Bailard in 1994 as a Research Associate and was later promoted to co-portfolio manager of the large growth/technology and science strategy. While Sonya still serves as co-portfolio manager of the strategy, today she is also Executive Vice President, Chief Operating Officer and Chief Risk Officer. Furthermore, she serves as a member of the Silicon Valley Community Foundation investment committee.

Andrea Mohr Gandolfo

Senior Vice President, Investment Counselor
36 years' investment experience, 36 years with firm

Andrea started her career at Bailard in 1981. Our late co-founder, Tom Bailard, helped mentor her and foster a culture where she thrived. As an Investment Counselor, she has had the pleasure of serving some of her clients for more than three decades. A Palo Alto native and current resident, Andrea enjoys volunteering for The Boys and Girls Clubs of the Peninsula where she has held various leadership roles.



Selena Chaisson, MD

Director, Healthcare Investments
23 years' investment experience, 12 years with firm

Science drives strategy

Selena harnesses her unique combination of science and investment management expertise—an MD, MBA and 23 years of biotech and healthcare portfolio management—to deliver a high-conviction strategy focused on revolutionary emerging healthcare opportunities.



Stacy Pearl

Vice President, Investment Counselor
8 years' investment experience,
New to firm



Tess Gruenstein

Senior Vice President,
Acquisitions and Portfolio Management
10 years' investment experience, 2 years with firm

“Being a part of Bailard’s real estate team has been a highlight of my career thus far. As a portfolio manager, I’ve had the opportunity to help build out our team and actively refine our investment strategy. Of our ten real estate team members, four are women, or 40%²—almost double the North American and global averages for the real estate investment industry. It most certainly has a positive impact on our culture and decision making.”

Fun facts

Stacy lives in San Francisco, where she serves on the Alzheimer’s Association Committee.

Stacy also enjoys helping clients with financial planning and investments, including Bailard Wealth Management’s Sustainable, Responsible and Impact investing clients.

Women of Bailard

WEALTH MANAGEMENT

Kimberly M. Aquino, CFP®

Senior Vice President
Investment Counselor
22 years' investment experience,
22 years with firm

Annalise Durante

Portfolio Associate, ESG Analyst
3 years' investment experience,
New to firm

Andrea Mohr Gandolfo

Senior Vice President
Investment Counselor
36 years' investment experience,
36 years with firm

Michele Klosky

Investment Associate
24 years' investment experience
1 years with firm

Louise Model

Vice President
Business Development Officer
25 years' investment experience,
New to firm

Romy S. Pavolotsky, CFP®

Senior Vice President
Investment Counselor
21 years' investment experience,
21 years with firm

Stacy Pearl

Vice President
Investment Counselor
8 years' investment experience,
New to firm

Sue Ramar, CFA

Senior Vice President
Investment Counselor
37 years' investment experience,
1 year with firm

Dana M. Scheer, CFA, CFP®

Senior Vice President
Investment Counselor
26 years' investment experience,
24 years with firm

INSTITUTIONAL

Linda M. Beck

Senior Vice President
Director, Fixed Income
31 years' investment experience,
5 years with firm

Selena Chaisson, MD

Director, Healthcare Investments
23 years' investment experience,
12 years with firm

Diana L. Dessonville

Executive Vice President
Director, Institutional Client Services
34 years' investment experience,
34 years with firm

Tess Gruenstein

Senior Vice President, Acquisitions and
Portfolio Management
10 years' investment experience,
2 years with firm

Kit Y. Lau

Operations Analyst
20 years' investment experience,
4 years with firm

Margie Nelson

Vice President
Asset Manager, Real Estate
12 years' investment experience,
New to firm

Erin M. Randolph

Vice President, Marketing,
Communications & Client Services
8 years with firm

CORPORATE OPERATIONS

Susan Barrett

Office Assistant
11 years with the firm

Janine Fabel

Receptionist
New to the firm

Jacqueline Giannini

Receptionist
10 years with firm

Janis M. Horne, CFA

Senior Vice President
Chief Compliance Officer
Investment Counselor
37 years' investment experience,
37 years with firm

Robin Maschewski

Administrative Assistant
29 years with firm

Anna Palmiery, CPA

Accounting Manager
2 years with firm

Tina Patel

Deputy Chief Compliance Officer
2 years with the firm

Dipika Patel, CPA

Chief Accounting Officer,
Real Estate
New to firm

Debbie Tanguay

Marketing Program Manager
3 years with firm

Sonya Thadhani, CFA

Executive Vice President
Chief Operating Officer
Chief Risk Officer
24 years' investment experience,
24 years with firm

Dawn Wishoff

Office Assistant
10 years with firm

Lily Wu

Controller
7 years with firm

¹ Statistics as of March 31, 2018.

² Preqin Special Report: Women in Alternative Assets, October 2017. <http://docs.preqin.com/reports/Preqin-Special-Report-Women-in-Alternative-Assets-October-2017.pdf>

Published May 2018

For more information, please call 650.571.5800 (toll-free 800.BAILARD) or visit www.bailard.com.

Bailard

Bailard, Inc.
950 Tower Lane, Suite 1900
Foster City, California 94404