STEPHEN LANZENDORF, CFA

Sudbury, MA 617.733.0134
steve.lanzendorf@gmail.com www.linkedin.com/in/steve-lanzendorf/

GLOBAL EQUITY INVESTOR | PORTFOLIO MANAGER

Meet Client Investment Objectives through Systematic, Collaborative Approach

Build systematic investment processes, collaborative teams, and strong relationships, resulting in better client outcomes and higher retention. Research stock selection factors to improve investment process. Recruit and mentor talented team members. Translate complex investment concepts into terms clients and consultants understand and appreciate.

PROFESSIONAL EXPERIENCE

QS INVESTORS, Boston, MA 2014 - 2020

Portfolio Manager | Head of Active Equity Portfolio Management
Directed Boston-based investment team accountable for managing $9B in active equity strategies, including long-only and long-short mandates in global markets. Represented full range of equity strategies to clients and consultants.

- Integrated former Batterymarch team into QS Investors while keeping employee and client retention at higher-than-expected levels.
- Initiated trades and managed portfolio characteristics for US small cap and global equity portfolios.
- Recommended new stock selection factors to Research team, making process more comprehensive. Reviewed research methodology, code (Python), and results for accuracy and completeness prior to implementation.
- Built insightful and consistent firm-wide messaging by presenting results and commentary to client advisory, investment oversight, and management committees.

BATTERYMARCH FINANCIAL MANAGEMENT, Boston, MA 2006 - 2014

Portfolio Manager | Deputy Chief Investment Officer 2011 - 2014
Managed team of portfolio managers and researchers accountable for overseeing active equity portfolios in global developed markets, including $2B US Small Cap strategy. Drove mandates for long-only and long-short, as well as specialized ESG and dividend-focused strategies.

- Reorganized 4 investment teams to bring US portfolios under global markets umbrella which led to greater efficiency.
- Re-engineered research approach to bridge DM and EM teams, achieving increased collaboration, higher quality research and faster adoption across markets.
- Collaborated on transition of legacy investment platform to more current technology, delivering greater efficiency and faster innovation.

Portfolio Manager | Head of US Equity Team 2006 - 2011
Oversaw research and implementation for US equity strategies.

- Directed aggressive research agenda, resulting in addition of new stock selection factors in valuation and behavioral dimensions.
- Achieved lower transaction costs and less performance dispersion across client accounts by updating portfolio construction methodology.

- Established relationships with leading business school programs that fostered recruiting efforts.

PRIOR EXPERIENCE

INDEPENDENCE INVESTMENT ASSOCIATES, Boston, MA
Director of Quantitative Strategies
Managed team of researchers, portfolio managers, and traders charged with developing and implementing systematic investment strategies for institutional clients. Served as member of John Hancock pension investment committee.

COLONIAL MANAGEMENT ASSOCIATES, Boston, MA
Quantitative Analyst | Portfolio Manager
Built quantitative systems to support management of traditional and systematic portfolios.

EDUCATION

Massachusetts Institute of Technology (MIT), Cambridge, MA

- **Master of Science (MS), Nuclear Engineering**
    - Emphasis on fission reactor safety and probabilistic risk analysis
- **Bachelor of Science (BS), Nuclear Engineering**

PROFESSIONAL AFFILIATIONS

- CFA Institute | CFA Society Boston
- Chicago Quantitative Alliance
- MIT Alumni Angels of Boston
- Guest Speaker at Industry Conferences (Lehman, Bernstein, MIT Sloan)
- Guest Lecturer at Business Schools (Cornell, Brandeis)