

FIDUCIENT ADVISORS PROMOTES FOUR ASSOCIATES TO PARTNER

Fiducient Advisors is pleased to announce the promotion of four individuals to Partner effective January 1, 2024. At a recent all-firm meeting, CEO Sabrina Bailey welcomed these talented associates to the firm's leadership team, noting their personal contributions to Fiducient Advisors' mission to help clients prosper, as well as their dedication to the firm's core values: service, collaboration and expertise.

"I am thrilled to announce the appointment of Shreya Canakapalli, Patrick Chase, Brian Samuels and Brian White as the newest partners at Fiducient Advisors," Bailey said. "Each day, our most treasured assets — our dedicated team members — come through our doors, driven by a passion to empower our clients' success and foster the professional development of their colleagues. These four outstanding individuals epitomize our commitment to delivering tailored solutions that precisely address our clients' distinctive requirements, while also nurturing the growth of future leaders within our firm."

Shreya Canakapalli

Shreya supports the firm's institutional clients by providing counsel and guidance on portfolio design, asset allocation, manager selection, investment policy statements and performance monitoring. She is an acknowledged subject-matter expert, serving as a member of the firm's Endowment & Foundation Business Council, Research Forum, Mission-Aligned Investing Committee and Investment Committee. Managing Partner Jessica Ludwig comments, "Over her nearly 12 years at Fiducient, Shreya has shown tremendous growth as an Institutional Consultant, becoming a valuable resource to both her clients and colleagues. She works with some of our largest and most complex endowment institutions and corporate relationships and possesses that coveted blend of investment prowess and relationship building."



Patrick Chase

As the Executive Director of Enterprise Applications, Patrick oversees the firm's information technology systems, ensuring systems, applications and vendor solutions align with Fiducient's business and its objectives. He has played a pivotal role in developing essential data systems so that firm associates can serve clients in the most efficient manner. "Pat understands the big picture of our business, clients and the services we provide," notes Managing Partner and Chief Operating Officer Julie Vander Weele, who adds, "This knowledge allows him to anticipate and carefully think through complex workflows to ensure maximum efficiency."



Brian Samuels

Managing Partner Tony Tranchese describes Brian as "... a terrific consultant, providing a high-level attention and service to a diverse array of clients. His strong technical expertise along with his thoughtful, pragmatic approach make him a valued resource to clients and colleagues alike." As co-leader of the firm's Defined Benefit Business Council, Brian serves as a firm resource for the defined benefit business practice. He also assists clients with portfolio design, manager selection and plan management, all with an eye to the special considerations and factors specific to our defined benefit and pension clients.



Brian White

Brian services institutional clients by providing advice and guidance on the manager search process, fund selection for portfolios and overall investment management for defined contribution plans. He serves as the chair of the firm's Defined Contribution Business Council and co-chair of the Recordkeeper Oversight Committee. Managing Partner Jessica Ludwig shared about Brian: "The word integrity comes to mind when I think of Brian White. While many of us affectionately reference his Eagle Scout days, the reality is that Brian consistently upholds those same standards every day. He approaches his work with steadfast commitment, treats Associates with respect and fairness and always acts with both his clients' and the firm's interests in mind."



These promotions reflect Fiducient Advisors' intent to create opportunity for our associates within a professionally stimulating environment offering growth, collegiality and respect. We believe this environment leads to greater continuity and satisfaction among our professionals, which can translate into better relationships with our clients. Please join the firm in celebrating the latest additions to our partnership team.