



Wealth Management

# Advisory council

Deutsche Bank

## Management and speaker biographies

**Shaishav Agarwal**, Global Head, Commercial Real Estate (CRE) Capital Markets, has been with Deutsche Bank for over 19 years. He manages securitization and syndication of CRE whole loans, CRE CLOs, SFR, Agency CMBS and other CRE related transactions. His experience ranges from Underwriting & Rating Agency analysis to Structuring, Pricing and Distribution of CRE loans, CDOs and Correlation trades. Prior to joining Deutsche Bank, Mr. Agarwal worked for 3 years at Banc of America Securities in the CMBS group as a structuring resource. Prior to that Mr. Agarwal worked at Merrill Lynch in Debt Capital Markets. Mr. Agarwal has a BE in Civil Engineering from Delhi College of Engineering and an MBA from IIM Bangalore, India.

**Cristiano Avenia**, Chief Information Security Officer for Deutsche Bank Americas, is responsible for protecting the bank's information assets for DB's Americas footprint. In addition, Mr. Avenia is also the CSO site lead in Jacksonville, responsible for the local CSO hub. Mr. Avenia has been with the bank since August 2005 and resides with his family in the US.

Prior to his current appointment, Mr. Avenia was the CISO for EMEA and Head of the CSO hub in Bucharest.

Mr. Avenia served as the Chief Information Security Officer for EMEA (ex. Germany and UKI), Responsible for protecting Deutsche Bank's information assets and managing security operations within the EMEA region. Mr. Avenia led the deployment and implementation of numerous information security and physical security capabilities to increase the security posture of our Banking entities and our offshore development centers in addition to acting as main relationship body with respect to regulators, government agencies, associations, industry groups, business and clients.

As the head of the CSO hub in Bucharest, Mr. Avenia created and established an operations hub for CSO.

Recruiting and managing over 100 security specialists of various CSO domains (SOC, Identity & Access, DLP, Malware, Forensics etc.) building the local footprint from 1 FTE to 100FTE in a little over a year.

Prior to his most recent appointments, in his 18 years with DB, Mr. Avenia has held several Cyber Security Operations roles. From PenTester to SWIFT specialist to Head of Cyber Security Problem Management, Mr. Avenia has been leading global teams, developing strategies and operating models for the global Information Security Operations function.

Mr. Avenia holds a BS in Science from the Frankfurt School of Finance and Management in Frankfurt.

**Adrian Cox**, Strategist on the Thematic Research team and focuses on the implications of Artificial Intelligence for investors, enterprises and society. He joined Deutsche Bank in 2009 and held senior leadership roles in Communications in London and Sydney before joining DB Research. He previously spent a decade covering finance and economics as an award-winning journalist and editor at Bloomberg News and the Financial Times in London, Brussels and New York. He is a graduate of Cambridge University and has an MBA from City University in London.

**Elom Kpordze**, Head of Deutsche Bank Wealth Management in San Francisco. He is also a member of the Deutsche Bank Wealth Management Americas Executive Council.

Prior to joining Deutsche Bank, Mr. Kpordze worked at Citi Private Bank where he managed the global assets of Ultra High Net worth individuals and their philanthropic ventures. He also led business development on the west coast for Citi Private Bank's employee stock ownership plan (ESOP)/1042 lending initiative. Mr. Kpordze served as Co-Chair of Citi's Black Heritage Affinity Group and as a Talent Committee Member on Citi's California State Leadership Council.

Mr. Kporde holds a B.Sc. in Electrical & Electronics Engineering from the University of Science and Technology, and an M.B.A. from the Haas School of Business at the University of California, Berkeley. He is FINRA series 7,63 & 66 licensed.

Mr. Kporde's community involvement includes serving on the board of Huckleberry Youth Programs in San Francisco. He also leads the financial Stewardship Ministry at Abundant Life Christian Fellowship in Mountain View, CA. Mr. Kporde resides in Burlingame and is an avid tennis and ping pong player.

**Deepak Puri, CFA®**, Chief Investment Officer for Deutsche Bank Wealth Management in the Americas. In his role, he Co-Chairs the Americas Regional Investment Committee, the management team responsible for investment strategy and asset allocation for discretionary and advisory portfolios in the Americas; and is a voting member on the Global Multi Asset Investment Committee, which formalizes and establishes the global house view.

Before being named CIO, Mr. Puri was the Head of Discretionary Portfolio Management in the Americas at Deutsche Bank Wealth Management, and previously served the firm in various positions within the Portfolio Management, Investment Strategy and Global Manager Research Groups. Prior to joining the Bank in 2004, he was a Senior Consultant in the Investment Advisory Services Group at Ernst & Young LLP, and also worked in various sales roles for PNC and Fleet National Bank.

He is widely published and has been quoted in various mainstream and financial publications, including the Wall Street Journal, Financial Times, CNN Business, Business Insider, Barron's, Bloomberg and Reuters to name a few. He also frequently appears on television and has been featured on CNBC, Yahoo Finance and Bloomberg.

Mr. Puri earned his B.Com (Honors) in Business Management from University of Delhi and has an M.B.A. in Finance from Seton Hall University. He is a CFA Charterholder, a Member of the CFA Institute and a Member of the New York Society of Security Analysts. Mr. Puri also holds the EFFAS certified ESG Analyst (CESGA) designation.

**Dylan Riddle**, Head of Communications, Americas joined Deutsche Bank in 2021, initially to manage key reputation issues in the Americas as regional Head of Media Relations during the Bank's three-

year transformation. He was elevated to the Head of Communications for the Americas in fall 2023, assuming responsibility for internal and external communications across the United States, Canada, Mexico, Brazil, Colombia and Argentina. He is also the global business partner for the Legal & Group Governance department.

Throughout his career, Mr. Riddle has developed a reputation as a strong partner to internal stakeholders, an honest and fair counterpart to journalists, an effective project manager, and a steady hand through crisis events. He has been entrusted as an on-the-record spokesperson to Reuters, the New York Times, the Wall Street Journal, the Washington Post, BBC, CNBC, and CNN, among others through countless crisis scenarios.

Directly prior to joining Deutsche Bank, Mr. Riddle was the Director of Communications at the Institute of International Finance (IIF) and previously spent time at Hamilton Place Strategies, now known as Penta Group.

In recognition of his industry leadership in 2023 Mr. Riddle was named the Chair of the Institute of International Bankers' Communications and Public Affairs Working Group, and in 2020 he was nominated to the industry-wide Future Leader's Group in recognition of his success in the role and potential for future growth.

Mr. Riddle graduated from Gettysburg College with dual Bachelor of Arts degrees in Political Science and Public Policy. He is currently a candidate for a Master of Business Administration from the Haslam College of Business at the University of Tennessee, Knoxville.

**Ramon Schuerer**, Global Head of Fraud Risk Management at Deutsche Bank. With an extensive career spanning three decades in the financial sector, Mr. Schuerer has garnered a wealth of experience and expertise, particularly in the domains of risk management. This includes IT security, IT audit, crisis management, and business continuity management. Over the first 15 years of his career, Mr. Schuerer developed a solid foundation in safeguarding financial institutions against a myriad of risks, ensuring robust security measures, and maintaining operational resilience amidst crises.

Transitioning into the latter half of his professional journey, Mr. Schuerer has dedicated the past 15 years to specializing in fraud investigations and fraud risk management. He has become a recognized expert in identifying, investigating, and mitigating fraudulent activities, protecting organizations from significant financial and reputational damage.

**Stefan Simon**, member of the Management Board, appointed on August 1, 2020. He is CEO of the Americas region and responsible for Legal and Group Governance. Until June 2024, he was the bank's Chief Administrative Officer (CAO) responsible for Regulatory Affairs, Legal and Governance, Compliance, Anti-Financial Crime and the Business Selection and Conflicts Office; he assumed an additional responsibility for the Americas region in May 2023.

Mr. Simon joined Deutsche Bank on August 1, 2019. He was a member of Deutsche Bank's Supervisory Board between August 2016 and July 31, 2019, and was Chairman of its Integrity Committee. He is a lawyer and certified tax consultant and between 1997 and 2016, he worked at a major law firm, where he was made partner in 2002. Since 2008 he has also been an Honorary Professor at the University of Cologne.

Mr. Simon studied law at the University of Cologne and received his Ph.D. in Public International Law there in 1998.

**Jacqueline Valouch**, Head of Wealth Planning and Philanthropy for Deutsche Bank Wealth Management based in New York. She leads a team comprised of in-house tax, trust and estate attorneys, and certified public accountants and together, they advise clients in areas such as estate planning, tax planning, life insurance, art collections, philanthropy, and next-generation wealth education, including a focus on international and cross-border wealth planning. They also work closely on the estate and trust administration needs of wealthy families.

Ms. Valouch has over 20 years of experience in the wealth planning area. After nearly a decade in private practice, she joined Fidelity Charitable where, for 15 years, she led a team of charitable planning experts, and advised individuals, families, and their advisors on how to incorporate charitable giving into their long-term planning goals.

Ms. Valouch has been featured as a subject matter expert at numerous conferences and panels on a variety of charitable planning topics. She holds a B.A. from the State University of New York at Albany and a J.D. from New York Law School, where she served as an adjunct professor of law for the LL.M., in Taxation program, teaching Charitable Organizations. Ms. Valouch sits on the Board of Directors for the Armory Foundation, is a member of the New York State Bar Association, Trusts & Estates Law Section, Charitable Planning Committee, is on the Executive Committee of WorkingNation, serves as a Leadership Advisor for Grace Farms Foundation and is also Co-Chair of the Lincoln Center Planned Giving Advisory Committee.

**Anthony P. Valvo**, Head of Deutsche Bank Private Bank - US. He is also a Chair of the Deutsche Bank Wealth Management US Executive Council.

Mr. Valvo has a long track record of success as both as a lender and a leader. He joined Deutsche Bank from Bank of America Private Bank, where he was a Managing Director and Market Sales Executive, responsible for the New York City Metro market. Previously, he held senior lending roles at PNC, Barclays and Citigroup.

Mr. Valvo earned his B.A. in Economics and Communications from City University of New York – Brooklyn College. He holds his Series 7, 24 and 66 licenses.

**Amrit Walia**, Head of the New York Market and Cross Border Team for Deutsche Bank Wealth Management. She is also a member of the Deutsche Bank Wealth Management Americas Executive Council. In this role she is responsible for leading the firm's Private Banking and Asset Management Business in the Northeast region as well the US based international coverage team. Leading a full-service team of private bankers who serve clients in wealth management, ESG investing, trust and estate planning, real estate and commercial lending and specialty financing, Ms. Walia and her team provide customized services to meet the needs of DB clients and their families. Prior to her current role, Ms. Walia served as SVP and Regional Managing Director at Wells Fargo Private Bank in New Jersey. In that role, she had oversight of the wealth management business, which included more than 380 team members and more than \$180MM in annual revenue. Ms. Walia had overall responsibility for private banking, credit, investment management, insurance, and trust and estate services through Wells Fargo Bank, NA, as well as brokerage services through Wells Fargo Advisors, LLC. Before working at Wells Fargo, Ms. Walia served as National Sales Manager for the Merrill Lynch Private Banking and Investment Group from 2011-2013 and lead business operations and strategy for the Ultra High Net Worth Segment at Merrill Lynch, a part of the Global Wealth & Investment Management Division of Bank of America. She also held a number of additional leadership roles during her tenure at Merrill Lynch.

Ms. Walia has over 25 years of experience in the investment and banking industry. She joined Merrill Lynch from Gartmore Global Investments, where she served as Investment Product Analyst and later as National Sales/Corporate Relationship Director. Before joining Gartmore, Ms. Walia worked for Groupama Asset

Management as an Institutional Equities Trader and Regional Sales Manager.

Ms. Walia earned her MBA at Hofstra University and holds Series 24, 7, 63 and 66 licenses. In addition to her professional responsibilities, she is an active proponent of women's development through a number of mentoring programs in the State of New York and New Jersey. She is also a member of the Board of Trustees for the Chapman University Argyros Business School and the Board of Trustees at Penn Med-Princeton Medical Center Foundation where she serves on multiple committees that support these organizations and the broader community. She is supporter of the All Stars Project, Boys and Girls Clubs of America, the American Cancer Society, the Alvin Ailey American Dance Theatre and the Developments in Literacy Organization. In 2016, Ms. Walia was recognized as one of Southern New Jersey's Women to Watch. In 2018, she was awarded the Women of Achievement Award by the Girl Scouts of America and in 2019, she was named to the NJBIZ magazines' prestigious list of New Jersey's Best 50 Women in Business and most recently was recognized by Insights Success as one of the Most Influential Women to Watch in 2020. She currently resides in New York with her family.

**Laura Weldon**, Vice President of Government & Public Affairs, joined Deutsche Bank's Washington, DC office in 2022, where she tracks key policies and regulations and helps represent the bank before policy stakeholders in Congress, the Administration, and regulatory bodies. Before joining Deutsche Bank, she worked on Capitol Hill for seven years in financial services policy and prior to working in Congress she worked at Deloitte Consulting in Dallas for a number of years. Ms. Weldon earned her bachelors in Supply Chain Management from Texas A&M University.

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