

Speaker Bios

About Megan McClellan



Megan McClellan serves as U.S. Head of Fixed Income for J.P. Morgan Private Bank, overseeing the development of customized solutions, including cash trading, derivatives and structures, for high-net-worth individuals.

With a team of 50 investment professionals serving clients, the Fixed Income business under Ms. McClellan’s leadership represents more than \$174 billion in total client assets. The Fixed Income business is recognized as a leader in creating innovative discretionary and brokerage solutions aligned with private client needs globally.

Ms. McClellan is a voting member of the Private Bank Global Investment Committee, serving as an asset class leader for fixed income. On the Investments Team, Ms. McClellan drives the Private Bank’s global interest rate and credit views and is responsible for fixed income allocation within the context of overall portfolio construction. Ms. McClellan also has a leadership role on the Private Bank’s Opportunistic Investments Committee, which drives best-thinking across tactical investments for brokerage clients. She also serves on the Asset & Liability Committee, responsible for oversight of banking and mortgage management.

Prior to joining the Private Bank, Ms. McClellan was a senior trader at J.P. Morgan investment bank, where she ran the prime non-agency mortgage-backed securities book. During her tenor at the investment bank, Ms. McClellan was successful in adapting the firm’s trading business to volatile markets, and worked closely with institutional investors, ranging from central banks to mutual and hedge funds.

Before joining J.P. Morgan, Ms. McClellan worked as a proprietary trader at a hedge fund, where she focused on mortgage backed securities and interest rates. Prior to that, she worked in fixed income trading at a global investment bank, where her experience included government bonds and interest rate derivatives in the U.S., and global structured interest rates in London.

Ms. McClellan is a graduate of NYU Stern School of Business (MBA) and the University of Chicago (B.S., Mathematics). She volunteers with the SPCA of Westchester County, with an education and community development project in Guatemala, and serves as a career mentor for the Phillips Academy alumni network. She resides in Westchester County, New York with her husband.

Ms. McClellan’s comments have appeared in the Financial Times, The Wall Street Journal, Bloomberg and Reuters. She is a regular guest on CNBC and Bloomberg TV.

About Heather Loomis



Heather Loomis is the Senior Fixed Income Portfolio Manager for J.P. Morgan Private Bank covering the Western and Southern portion of the United States. A member of the Fixed Income Portfolio Management Team since 2003, Heather is responsible for overseeing approximately \$9 billion in assets. She is in charge of investments for the tax aware and taxable fixed income businesses and manages assets for both individuals and institutions. Prior to joining J.P. Morgan, Heather was a proprietary equity trader at First New York Securities in Manhattan. Heather graduated Phi Beta Kappa from Duke University with a degree in Economics and Spanish. She is a holder of Series 7, 55 and 63 certifications.

About Richard Taormina



Richard D. Taormina is Head of the Tax Aware Fixed Income Group, J.P. Morgan Asset Management. An employee since 1997, Rick has over 20 years of experience as a municipal bond manager. Rick joined the firm as a state-specific mutual fund manager and strategist and has been head of the municipal strategies group since 2005. He is responsible for managing all municipal and tax-aware mutual funds, high net worth and institutional fixed income accounts, and quantitative analysis.

In 2001, Rick initiated a process that allows separately managed accounts to benefit from the power of the J.P. Morgan platform, including systematic strategic management, institutional level trade execution, and improved portfolio benchmarking. Rick also expanded the use of quantitative analysis and tools, allowing individuals to benefit from strategies previously available only to institutional and taxable buyers. Prior to joining the firm, Rick was a senior trader for national, high-yield, and state-specific funds at the Vanguard Group, where the team consistently performed in the top-quartile. Rick holds a B.A. in Economics from the University of Delaware, an M.B.A. in Finance from Wilmington College, and is a Certified Financial Planner (CFP).