Executive Biographies

Mark C. Healy | President & Chief Executive Officer

Mark is a visionary leader with more than 34 years of experience in the financial services industry. As CEO, his focus is on creating digital wealth leaders and driving digital transformations. He was previously the President and Chief Executive Officer of AST Financial, LLC (AST), overseeing the administration of over 4,000 publicly traded companies and 8 million shareholders accounts across North America.

Prior to AST, Mark was Executive Vice President for National Financial Services, a Fidelity Investments Company. He was responsible for all National Financial Sales and Relationship teams — covering over 325 broker dealer clients nationwide and custody of over $700 billion in assets. Mark has also held executive and senior roles with TD Securities, Swiss Bank Corporation and BGK Securities.

John Kimbro | Chief Technology Officer

John is a highly accomplished technology leader bringing more than 34 years of experience in financial services to his role as Chief Technology Officer. Working at the intersection of technology and business, John oversees all aspects of technology at FusionIQ, developing integrated platform solutions that are easy to implement and enjoyable to use.

Prior to joining FusionIQ, John held numerous senior technology, operations, and business roles with both Fidelity Investments and Bank of America. His deep knowledge includes extensive expertise in technology integrations, solution architecture, and operational effectiveness with specific focus on advisor and investor experience platforms. John holds FINRA Series 7, 24, and 63 licenses.

Jim Cott | Chief Financial Officer

Jim is a dynamic industry veteran bringing more than 25 years of experience in financial services to his role as Chief Financial Officer. Jim is responsible for oversight of all finance functions including financial reporting, treasury, banking relations, revenue capture, contract negotiations, and financial forecasting. He develops strategies for prospering in the rapidly evolving global fintech market and regulatory environment.

Jim has held senior finance, operating, and relationship management positions at leading custody and investment firms, including Apex Clearing Corporation where, as VP, Finance, he played a key role in Apex's transformation and profitability while assisting in the incubation of today's fintech broker dealers. He has also held roles at Fidelity Investments, InvestIN, and HD Vest Securities where he helped initiate their conversion from First Clearing to National Financial Services. Jim holds FINRA Series 4, 7, 24, 55, and 63 licenses.

John Guthery, CFA | Chief Investment Officer

John is a highly respected investment executive, bringing more than 27 years of experience to his role as Chief Investment Officer for FusionIQ. As CIO, John focuses on developing advisor platforms and business lines including finTAMP and Digital Model Marketplace. He also contributes to FusionIQ's thought leadership and market analysis.

John's extensive financial services background includes leading market research, due diligence and platform enhancements for top-tier wealth managers including LPL Financial, where he spent 19 years running product research, Park Avenue Securities, Voya Financial and WP Carey where he helped to design and manage public and private real estate funds and public BDCs.

Howard Atkinson, CFA | Head of Business Development

One of Canada's most respected wealth management executives, Howard brings more than 30 years of executive experience to his role as Head of Business Development. Howard is responsible for introducing the FusionIQ One platform to the Canadian market, leveraging his relationships with key industry leaders across business sectors.

Howard pioneered actively managed ETFs as the co-founder and President of Horizons ETF Management and led the introduction of iShares ETFs into Canada at Barclays Global Investors Canada. He has held senior executive positions with other leading firms including Mackenzie Financial Corporation and CI Funds. Howard has advised several successful fintechs including WealthBar Financial and 3iQ. He is the author of four books including The New Investment Frontier III: A Guide to Exchange Traded Funds for Canadians.

Douglas Anweiler | Chief Brand Officer

Doug is an accomplished brand leader, bringing more than 37 years of executive experience to brand development, business strategy, marketing, and strategic communications. As Chief Brand Officer, Doug is responsible for developing, implementing, and overseeing the overall brand strategy for FusionIQ in North America.

Prior to joining FusionIQ, Doug was the brand leader for a wealthtech company creating digital innovation in behavioural finance, integrated advisor platforms, and martech. Over the past two decades he has been focused on developing strategic business plans and building award-winning brands, creating more than a dozen brands in the fintech, aerospace, technology, and other sectors.

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