Executive Biographies

Eric Noll | Chair & Chief Executive Officer

Eric is one of the most accomplished financial services leaders in America, bringing more than two decades of executive leadership in capital markets, financial technology, and private equity. As Chair and CEO, Eric is focused on democratizing wealth management and expanding the penetration of wealth technology into a broad range of sectors.

Before joining FusionIQ, Eric held senior executive positions in leading organizations including Stone Ridge Capital Partners where he was CEO, and serving as President and CEO of Convergex, one of the three largest agency broker-dealers in the world. Other executive positions include Executive Vice-President, Transaction Services for NASDAQ, and founder of Willow Creek Capital, a leading financial services advisory and consulting services firm.

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

Peter is an accomplished sales executive bringing more than six years of business development in financial services to his role of Head of Business Development. An expert in building strategic relationships and consultative selling, Peter is focused on developing strategic client partnerships with financial institutions and advisors.

Prior to FusionIQ, Peter was a sales associate for Olden Lane Securities, managing client relationships. His commitment to client success resulted in the origination of $32.5M of subordinated debentures and coordinated efforts to build a pipeline of $140M of subordinated debt underwriting. Peter holds FINRA Series 7 and 63 securities licenses.

Sloan Shanahan | Chief Revenue Officer

Sloan is a distinguished sales leader with extensive expertise driving growth and innovation across the financial technology and consulting industries. As FusionIQ's Chief Revenue Officer, she is focused on scaling revenue operations, building high-performing teams, and empowering financial institutions to thrive in a rapidly evolving wealth management landscape.

Before joining FusionIQ, Sloan held senior leadership roles in prominent organizations, including the Director of Sales at Sikich, where she led go-to-market strategies and alliance development across the technology ecosystem. Previously, she served as Partner at Tential Solutions, where she spearheaded the growth of their consulting practice, and as a Manager in EY's Financial Services Consulting practice, contributing to major transformation initiatives for top-tier financial institutions.

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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