



## Jon Hale

Mr. Jon Hale, Ph.D., CFA has been Global Head of Sustainability Research at Morningstar Inc. since March 2016. Mr. Hale has been a Director of Manager Research for North America at Morningstar Investment Management Europe Ltd, Research Division since June 2, 2014. Mr. Hale oversees the team's operations, thought leadership, and manager research coverage across active, passive, fund-of-fund, and alternative investment strategies. Earlier, he served as Portfolio Manager of Morningstar OBSR, and led the consulting team. Mr. Hale served as Portfolio Manager of Morningstar Associates, L.L.C., Asset Management Arm and various Transamerica Series Trusts. He rejoined Morningstar in November 2001. He had left Morningstar OBSR in January 2000, and then worked for Domini Social Investments, LLC. Initially, he joined Morningstar in 1995 as a mutual fund analyst and helped launch institutional investment consulting for Morningstar in 1998. He served as Portfolio Manager of various Pax World Funds since 2009. He also holds the Chartered Financial Analyst(R) (CFA) designation. Mr. Hale holds a Bachelor's Degree with honors from the University of Oklahoma and a Doctorate Degree in Political Science from Indiana University.

