



ROCKLINC

Worth. Investing.

Jonathan Mark Wellum, B.Comm., B.Sc., MA, MBA, CFA

Jonathan is the founder and CEO of ROCKLINC Investment Partners. The company is an independent research-driven investment management firm focusing solely on creating portfolios of high quality assets. ROCKLINC's portfolios are customized to meet the investment goals and objectives of their clients. Their vision is to be known as a world class provider of prudent wealth management services for discreet investors. These include private individuals, families, corporations and foundations.

Prior to founding ROCKLINC Investment Partners Inc. in 2009, Jonathan began his investment career with Portland Investment Counsel (formerly AIC Investment Services) in 1990 and served as the firm's Chief Executive Officer. In September 2009, AIC's retail mutual fund business was sold to Manulife Financial. AIC's assets under management grew from \$10 million to a peak of \$15 billion, making the firm the largest privately owned mutual fund organization in Canada.

During his tenure at Portland Investment Counsel, Jonathan managed a number of equity mutual funds and was responsible for Portland's Private Client business.

In 1995, Jonathan was named Fund Manager of the Year by the Investment Executive Magazine and in 1997 awarded Fund Manager of the Year at the Canadian Mutual Fund Awards Gala. In addition, Jonathan was a recipient of Canada's Top 40 under 40.

Jonathan is currently a member of the McMaster University Investment Pool Committee and a board member of the Canadian National Christian Foundation. He serves as an elder at Trinity Baptist Church in Burlington Ontario.

Jonathan has been married to his wife Heidi for twenty-four years and they have four children, Johanna, Jonathan Jr., David and Christina.

Jonathan holds a Bachelor of Commerce and a Master of Business Administration degree from McMaster University, and Bachelor of Science degree from the University of Waterloo. He also completed a Master of Arts degree from Trinity Evangelical Divinity School (Chicago). He holds the designation of Chartered Financial Analyst (CFA).