



Marlene K. Puffer, Ph.D., CFA
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If you are considering globalizing your portfolio strategy or product offerings in light of the removal of foreign property restrictions, or accessing global credit markets,

Twist Financial can design fixed income and foreign currency investment and marketing strategies to enhance your portfolio diversification and risk/reward profile, evaluate new asset classes, provide sound recommendations and ensure successful implementation.

Depth & Breadth of Financial Expertise

Dr. Marlene Puffer, CFA, Managing Director of Twist Financial, is well known and respected in the capital markets. She has over 15 years of experience in fixed income portfolio management, client service and marketing, debt structuring, analytics, quantitative modeling, and academia. Marlene's diverse experience includes investment management at PIMCO Canada and Legg Mason Canada, working on the trading floors of major investment dealers, and as a professor at the University of Toronto's Rotman School of Business. Her depth and breadth of fixed income experience are distinct in the industry.

Creative and Practical Solutions

Marlene's unique combination of sophisticated financial market knowledge, business acumen, and problem-solving capabilities, bring creative and practical solutions to her clients' most complex financial challenges. She emphasizes viable implementation and sound theory in the development of comprehensive investment solutions to adapt to evolving market dynamics and challenges such as regulatory changes and governance constraints.

Customer-Focused Approach

With a strong customer orientation, Marlene uses her excellent communication skills to present complex information in a user-friendly way. She is passionate about forming long-term partnerships with her clients and uses a consultative approach to build strategies that reflect clients' individual perspectives. Marlene is known for her integrity, loyalty to her clients, and tremendous energy.

Commitment to the Community & Learning

Dr. Puffer is committed to the community as evidenced by her service at the Canadian Investment Review, the Toronto CFA Society, the University of Toronto, and as President of Women in Capital Markets. She is a sought-after presenter and guest lecturer, and has authored a number of articles including "Corporate Credit Counts" that recently appeared in Benefits Canada. For 5 years, Marlene was a professor of Finance at the University of Toronto. She is a CFA charterholder, holds a Ph.D. in Finance and Applied Statistics and a M.Sc. in Business Administration from the University of Rochester, and has an M.A. and B.A. in Economics from the University of Toronto.