Corporate Biography

Richard A. Spillane, Jr.

Rick Spillane is president of Strategic Advisers, Inc. (SAI), a subsidiary of Fidelity Investments. Fidelity is the largest mutual fund company in the United States, the No. 1 provider of workplace retirement savings plans and a leading online brokerage firm.

Mr. Spillane joined Fidelity in 1988 as an analyst and portfolio manager of Fidelity Select Technology Portfolio. He served as U.S. director of research from 1988 until 1994, when he was named chief investment officer for Fidelity International Limited in London, which was founded in 1969 to provide investment management services to investors outside the United States. In this role, Mr. Spillane oversaw the company’s investment organization in Europe and acted as co-portfolio manager for the Fidelity Funds International Portfolio. Mr. Spillane returned to Boston in 1997 as group leader for the Income Growth Group within Fidelity Management & Research Company, subsequently overseeing international investing, then U.S. equity investing. He was named executive vice president and head of Global Investment Strategy in September 2002 and assumed his current role in June 2005.

Mr. Spillane also serves as vice chairman of Fidelity’s Political Action Committee, FMR Investment Committee and the Board of Fidelity Investments Life Insurance Company. He also serves as a trustee of the Fidelity Rutland Square Trust.

Before joining Fidelity, Mr. Spillane was an analyst and portfolio manager for Eaton Vance Management in Boston for 10 years. Prior to Eaton Vance, he was a chemical engineer for Union Carbide Corporation in Tonawanda, New York, from 1972 to 1975.

Mr. Spillane serves as the Chairman of the Board of Xaverian Brothers High School and is a member of the Investment Committee for Rensselaer Polytechnic Institute, a member of the Catholic Schools Foundation Investment Committee and a member of the Babson Graduate Advisory Board.

Born in 1951, Mr. Spillane received a bachelor of science degree in chemical engineering from Rensselaer Polytechnic Institute in Troy, New York, in 1972. He received an MBA, with distinction, from Harvard Business School in 1977. Mr. Spillane is a Chartered Financial Analyst charterholder.