



Suite 1920, 1177 W Hastings St.
Vancouver, BC V6J 2K3
604-681-5183
Fax: 604-681-5146
invest@vertexone.com
www.vertexone.com

Vertex Managed Value Portfolio

Investment Management Team

Matthew Wood, CFA
Portfolio Manager

Mr. Matthew Wood is a founding partner and director of Vertex One Asset Management. Mr. Wood has overall responsibility for the investment and trading decisions affecting the Vertex Managed Value Portfolio, Vertex Value Fund and Vertex Enhanced Income Fund. He has operated as the lead manager of the Managed Value Portfolio since its inception on April 3, 1998. Mr. Wood has over 20 years experience investing in equities, fixed income and derivatives. His career began as an analyst, later becoming a Financial Advisor, with Royal Trust. He was a Portfolio Manager with HSBC Asset Management before co-founding Vertex One Asset Management. Mr. Wood holds the professional designation of Chartered Financial Analyst (CFA) and is a member of the Institute of Chartered Financial Analysts.

Emily Wheeler, CFA
Portfolio Manager

Emily joined Vertex One in February of 2004. She worked previously for Credential Financial (a national wealth management firm affiliated with the Canadian credit union system) and has over seven years of investment industry experience. Emily is a CFA charterholder and a member of the Vancouver Society of Financial Analysts. She received a Bachelor of Arts from the University of British Columbia. Emily is part of the trading and research teams for the funds managed by Vertex One Asset Management.