BELL FINANCIAL GROUP

STATE STREET

CIO Perspectives on the 2026 Outlook.

Will Riggall | Chief Investment Officer at Bell Financial Group

Will Riggall is the inaugural Chief Investment Officer at Bell Financial Group, appointed in 2025 to lead the firm's global and domestic investment strategy. With more than 20 years of experience, he oversees asset allocation, equity portfolio construction, and the integration of external fund managers across all asset classes. He brings extensive expertise in the design and construction of multi-asset strategies, underpinned by a disciplined, research-driven approach to portfolio construction, ensuring clients achieve robust, risk-adjusted outcomes aligned with long-term wealth creation.

Prior to joining BFG, Will held Chief Investment Officer and senior portfolio management roles across institutional and boutique funds management, as well as diversified advice groups. He has extensive experience designing and delivering investment solutions that provide advisers and clients access to global opportunities. Will works closely with advisers and clients to align strategies with individual objectives, reinforcing BFG's commitment to transparency, innovation, and high-quality advice.

Lori Heinel | Global Chief Investment Officer at State Street Investment Management

Lori Heinel is Executive Vice President and Global Chief Investment Officer at State Street Investment Management. In this role, she oversees the firm's full investment platform, spanning index and ETFs to active multi-asset and alternative strategies. She leads a global team of more than 600 investment professionals and serves on the Executive Management Group, Investment Committee, and Global Product Committee.

Before joining State Street Investment Management, Lori was Chief Investment Strategist and Head of Investment Products at OppenheimerFunds, driving market strategy and product innovation. She also held senior leadership roles at Citi Private Bank and SEI Investments, developing investment solutions for high-net-worth and institutional clients, including pension and managed account strategies.