



EXECUTIVE FORUM '18

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Charlie Morrison
Fidelity Investments
President, Asset Management

Charlie Morrison is president of Asset Management for Fidelity Investments, a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing and other financial products and services to more than 20 million individuals, institutions and financial intermediaries. Mr. Morrison is also a member of Fidelity's Executive Committee.

In his current role, Mr. Morrison oversees Fidelity's investment divisions that collectively manage \$2.1 trillion in retail and institutional assets on behalf of individual investors, intermediaries, and institutions worldwide. In addition to overseeing Fidelity Management & Research Company (FMRCo), Strategic Advisers, Inc. and the Global Asset Allocation investment divisions, Mr. Morrison is also responsible for Asset Management's functional support areas, including operations, compliance, technology, fiduciary oversight, board support, human resources, and finance.

Prior to this appointment, Mr. Morrison served as president of Asset Management's Fixed-Income division, a role he held since 2011. Prior to that, Mr. Morrison was in a senior role at Fidelity overseeing several strategic projects for the company. From 2004 to 2009, he served as president of Fidelity's Money Market division and, from 2002 to 2004, he served as head of Fidelity's Bond division.

Mr. Morrison joined Fidelity as a corporate bond analyst in 1987. He began managing Trust accounts in 1990 and was promoted to a vice president of Fidelity Management Trust Company in 1992. During this time, he was responsible for managing a variety of short-term, as well as broad-market, bond portfolios. From 1995 to 1997, he managed Fidelity Short-Term Bond Fund, Spartan Short-Term Bond Fund, and Fidelity Advisor Short Fixed Income Fund. Mr. Morrison managed the fixed-income investments for Fidelity Asset Manager, Fidelity Asset Manager: Income, Fidelity Asset Manager: Aggressive, Fidelity Asset Manager: Growth, Fidelity Advisor Asset Allocation, and Fidelity Global Asset Allocation portfolios from 1996 until 2002.

Before joining Fidelity Investments, Mr. Morrison was a bond analyst with Dean Witter Reynolds in New York from 1983 to 1985.



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Mr. Morrison earned his bachelor of arts degree in economics from Dartmouth College in 1983 and an MBA from Harvard Business School in 1987.