



For Immediate Release

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## **MFS Investment Management Announces New Head of Australia and New Zealand**

### **Marian Poirier Announces Her Retirement After 30 Years in the Industry**

**Sydney (15 August 2023)** – MFS Investment Management® (MFS®) is pleased to announce that Josh Barton, Managing Director, Relationship Manager and Head of Institutional Sales will become the new Managing Director and Head of Australia and New Zealand, effective 1 September 2023.

He succeeds Marian Poirier, Senior Managing Director and Head of Australia and New Zealand, who will retire from MFS in April 2024.

Commenting on this organisational change, MFS Global Head of Distribution Carol Geremia said, ‘We thank Marian for her many contributions to MFS and wish her all the best in her retirement. I have worked closely with her for many years, and she has been a great asset to the firm and the wider investment community.’

‘As part of MFS’ thoughtful and transparent approach to long-term succession planning, Marian has been working closely with Josh on the transition and will continue to do so through until Q1 2024. We feel it is important to provide a lengthy transition period as it ensures both a smooth transition of responsibilities and an uninterrupted continuity of services to our clients,’ she added.

Commenting on her retirement, Marian said, ‘I am privileged to have worked with MFS for over 20 years. I feel proud of our accomplishments and happy to be handing over the reins at such an exciting point in MFS’ journey in Australia and New Zealand.’

‘The diversification into fixed income is well under way, and the team headed up by Josh is well prepared for the next phase. Josh has played a key role in solidifying our presence across the region and helping to foster our local culture. He is more than ready to lead the team in the years’ ahead. Playing the long game at MFS extends beyond how we invest and how we manage the business, but importantly, it also has to do with how we manage our people, and this transition is a further example of this,’ she concluded.

Josh has more than 22 years of industry experience. He joined MFS in 2012 and is currently responsible for leading the firm’s sales efforts involving institutional investors in Australia and New Zealand. Before joining the firm, he spent 11 years at BlackRock, holding several roles, including director and senior account manager in the global client group. He started his career in the financial services industry in 2001.

Commenting on his appointment, Josh said, ‘I am proud to have been chosen to lead MFS’ business in Australia and New Zealand. I am committed to being a strong leader for the team and continuing to serve our clients with what I believe to be best-in-class investment solutions.’

MFS has a long history of working with clients in Australia and New Zealand and services approximately AUD\$29.1 billion of client assets. Its global assets under management as at 30 June 2023 stand at AUD\$896.2 billion.

## **ENDS**

### **About MFS Investment Management**

In 1924, MFS launched the first US open-end mutual fund, opening the door to the markets for millions of everyday investors. Today, as a full-service global investment manager serving financial advisors, intermediaries and institutional clients, MFS still serves a single purpose: to create long term value for clients by allocating capital responsibly. That takes our powerful investment approach combining collective expertise, thoughtful risk management and long-term discipline. Supported by our culture of shared values and collaboration, our teams of diverse thinkers actively debate ideas and assess material risks to uncover what we believe are the best investment opportunities in the market. As of June 30, 2023, MFS had approximately AUD\$896.2 billion in assets under management.

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