

# Herb Blank, Senior Consultant

## Product Strategy and Implementations Consulting

Mr. Blank is a senior consultant and practice leader in our Product Strategy and Implementations Consulting Practice. He has over 25 years of experience in financial product innovation and quantitative analysis and is recognized as pioneer in the Exchange Traded Fund (ETF) industry. Herb is credited with the product development and launch of iShares, GLD, and X Shares. He is also well known for his development of the construction and maintenance methodologies for Dow Jones Global Indexes. In his portfolio management role at Deutsche Bank, Herb established the first family of ETFs to trade on the NYSE. In his prior experience, Mr. Blank was president and founder of QED International Associates, a leading financial industry consulting firm specializing in quantitative modeling and the design, development and maintenance of indexes and ETFs.

Herb specializes in ETFs, enhanced indexing, product development, and providing market intelligence expertise. He has substantial experience with financial product design, proof-of-concepts and related model testing. Herb also has expertise in the development of custom indexes that define, isolate and measure the performance of discrete segments of the new global economy. More recently Mr. Blank has been in the forefront for the development of socially responsible indexes (SRI), and environmental, social, and governance (ESG) indexes. He also assisted Thomson Reuters for the creation and maintenance of the Thomson Reuters Corporate Responsibility Ratings and Indexes.

Mr. Blank consistently leverages his experience, quantitative skills, and market intelligence expertise to assist clients with product strategy and design, marketing plans, and implementations of new financial products, custom indexes, and differentiated data services. He has participated in product design and marketing advisory roles for numerous offerings of new financial products and has assisted with introducing differentiated data products to the investment industry.

In his recent engagement, Herb assisted James Investment Research with introducing its first ETF with the James Biblically Responsible Investment ETF (JBRI).

Herb frequently publishes industry white papers and articles, and is credited with having a large network of institutional investment professionals, RIAs, and wealth managers. Mr. Blank also serves as chairman for QWAFEFW, an industry society for quantitative analysis and applied finance professionals.

### Experience

Deutsche Bank	QED International Associates
Rapid Ratings International	Value Line, Inc.
Fidelity Bank	S-Network Global Indexes
James Investment Research	Exponential ETFs
Thomson Reuters	Brand Loyalties

### Education and Certifications

New York University, New York, NY MBA degree, concentration in Finance	University of Pennsylvania, PA Bachelor of Arts degree in Mathematics
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Previously held Series 7, 63 and 65 licenses