

Portfolio Managers



Brendan T. N. Caldwell
B.Sc., M.A., FCSI, CFA

Mr. Caldwell holds a B.Sc. from the University of Toronto, Trinity College, an M.A. from the University of London and a Chartered Financial Analyst (CFA) designation. Prior to joining this Investment Management team, Mr. Caldwell worked for a major mutual fund company and was a top performer for a large, international investment banking organization. Mr. Caldwell is the portfolio manager for Caldwell's Mutual Funds.



Thomas S. Caldwell, C.M.
B.Comm, Hons-Economics, FCSI

Mr. Caldwell founded Caldwell Securities Ltd. in 1980. He has held progressively senior positions at major investment firms in Toronto, Montreal and New York since 1965. His focus is on serving the investor and his insistence on conservative investments has produced excellent results for clients over the last four decades.



Robert M. Callander
B.Sc., M.B.A., CFA

Mr. Callander is an investment industry executive with over thirty years experience, including senior positions in investment research and corporate finance. He provides financial advisory services to both major corporations and private clients. Mr. Callander is a Chartered Financial Analyst (CFA) and professional geologist.



J. Dennis Freeman

Mr. Freeman's investment experience has been primarily focused on the fixed income sector, including managing a major bond fund. His broad experience and market strategy views are highly regarded in the investment industry and have resulted in a reputation that comes only from longterm results.



Charles Hughson
M.A., Hons-Economics, Strategic Advisor

Mr. Hughson is an investment industry professional with over three decades of experience. Graduating from the University of Aberdeen, Scotland, with an M.A. (Hons.) degree in economics, he began his career as an investment analyst in London, England. Mr. Hughson immigrated to Canada in 1975 and joined the Alberta Treasury Department, then a leading Canadian insurance company.



John R. Kinsey

Mr. Kinsey contributes over forty years of investment experience, including portfolio management, research and trading. He also coordinates the equity research functions, which include monitoring our firm's overall universe of securities followed.



Armel Kitieu
B.Comm, CFA

Mr. Kitieu graduated from Concordia University with a Bachelor of Commerce in Finance and Economics. He also hold a degree in Economics from the Universite de Montreal. He joined the Caldwell team in 2006 as a research associate and is responsible for the proprietary computer model portfolios and the analysis, research and valuation of exchanges worldwide.



Jennifer Radman
B.B.A., CFA

Ms. Radman joined Caldwell as an equity analyst in 2003. She has performed extensive work on the securities exchange industry and plays a key role in the management of the Caldwell Mutual Funds. Ms. Radman earned the Chartered Financial Analyst designation after graduating cum laude with a degree in Business Administration from the University of South Carolina.



Thomas Ratnik
B.A.Sc., P.Eng.

Mr. Ratnik's responsibilities include market strategy, timing and technical analysis. With forty years of experience as a technical analyst, Mr. Ratnik has developed a series of criteria which assist in establishing entry and exit points for equity portfolio positions. Mr. Ratnik is a professional engineer.