

富蘭克林證券投資顧問股份有限公司 函

地址：台北市忠孝東路四段 87 號 8 樓

聯絡方式：02-2781-0088

受文者：第一金人壽保險股份有限公司

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主旨：茲通知富蘭克林坦伯頓全球投資系列之基金經理團隊異動，請 查照。

說明：自 2019 年 10 月 15 日起，富蘭克林坦伯頓全球投資系列以下基金經理團隊異動：

基金名稱	現任基金經理團隊	新任基金經理團隊
富蘭克林坦伯頓美國政府基金 (本基金之配息來源可能為本金)	羅傑·貝斯頓(Roger Bayston) 保羅·維克(Paul Varunok)	保羅·維克(Paul Varunok)
公司債基金(本基金主要係投資於非投資等級之高風險債券且基金之配息來源可能為本金)	貝西·霍弗曼(Betsy Hofman) 葛倫·華勒(Glenn Voyles)	派翠西亞·歐康諾(Patricia O'Connor) 葛倫·華勒(Glenn Voyles)
富蘭克林坦伯頓精選收益基金 (本基金有相當比重投資於非投資等級之高風險債券且基金之配息來源可能為本金)	桑娜·德賽(Sonal Desai) 羅傑·貝斯頓(Roger Bayston) 派翠西亞·歐康諾(Patricia O'Connor) 肯特·伯恩斯(Kent Burns)	桑娜·德賽(Sonal Desai) 派翠西亞·歐康諾(Patricia O'Connor) 鍾威爾(Will Chong) 袁德成(David Yuen)

此項變動不會影響各基金既有之投資政策，在未來一期的中文月報單張中，經理人異動情況將做同步調整。

董事長 嚴守白

正本：第一金人壽保險股份有限公司

副本：

鍾威爾(Will Chong)

鍾威爾(Will Chong)

現任富蘭克林坦伯頓固定收益團隊副總裁與基金經理人。

聖馬蒂奧，加州，美國

擅長研究分析多類別固定收益產品投資策略、在信用、利率及匯率進行量化分析，特別是在相對價值及衍生性商品方面。

於 2008 年加入富蘭克林坦伯頓基金集團之前，曾任職於豐田金融服務公司的資深債券分析師，以及美林固定收益交易團隊進行系統開發。

於南加州大學取得工商管理碩士學位，以及紐約大學取得經濟及資訊系統學士具備特許財務分析師(CFA)及財務風險管理師(FRM)執照

WILLIAM CHONG, CFA, FRM

Vice President

Portfolio Manager

Franklin Templeton Fixed Income Group

Franklin Advisers, Inc.

San Mateo, California, United States

William Chong is a vice president and portfolio manager for the Franklin Templeton Fixed Income Group. Mr. Chong performs portfolio construction and implementation for multi-sector fixed income strategies. In addition, he conducts quantitative research within credit, rates, and fx, with emphasis on relative value and derivative products.

Prior to joining Franklin Templeton in 2008, Mr. Chong was a senior treasury analyst at Toyota Financial Services where his experience included asset-liability management, pension investment management and debt issuance. He also has worked in systems development at Merrill Lynch Fixed Income Trading.

Mr. Chong holds an M.B.A. in finance from the University of Southern California and a B.S. in economics and information systems from New York University.

He is a Chartered Financial Analyst (CFA) charterholder and a Financial Risk Manager (FRM)

- Certified by the Global Association of Risk Professionals.

袁德成(David Yuen)

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現任富蘭克林坦伯頓固定收益團隊資深副總裁與基金經理人。

聖馬蒂奧，加州，美國

擅長研究固定收益量化策略，以及投資組合產業配置、構建及風險監控

加入富蘭克林坦伯頓基金集團之前，曾任職於海納國際集團的資深投資分析師，以及艾力克斯布朗公司的特定收益交易經理。

於加州理工學院取得化學及工商管理碩士榮譽學位，加州大學洛杉磯管理學院取得金融榮譽學位

具備特許財務分析師(CFA)及財務風險管理師(FRM)執照

DAVID YUEN, CFA, FRM

Senior Vice President

Director of Quantitative Strategy, Portfolio Manager

Franklin Templeton Fixed Income Group

Franklin Advisers, Inc.

San Mateo, California, United States

David Yuen, senior vice president, serves as a director of quantitative strategy in the Franklin Templeton Fixed Income department. Mr. Yuen develops portfolio strategies and investment processes with emphasis on sector allocation, portfolio construction, risk budgeting, attribution and relative value security selection procedures.

Prior to joining Franklin Templeton, Mr. Yuen was senior investment officer for Susquehanna Partners and a manager of fixed income trading at Alex Brown, Inc.

Mr. Yuen holds a B.S., with honors, in chemistry from the California Institute of Technology and an M.B.A., with honors, in finance from the University of California, Los Angeles Graduate School of Management. Mr. Yuen is a Chartered Financial Analyst (CFA) charterholder and is a qualified Financial Risk Manager (FRM), as certified by the Global Association of Risk Professionals. He has authored various financial and portfolio management publications and speaks at diverse financial and capital market seminars and conferences.