



FREDA LAM ZIETLOW, CFA, NACD.DC

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Audit Committee Financial Expert & Global Financial Services Executive

Freda Lam Zietlow is a seasoned financial services executive and board director with over 25 years of experience spanning asset and wealth management, capital markets, banking, and real estate. Recognized as an **Audit Committee Financial Expert**, Freda brings deep expertise in **audit, risk management, regulatory oversight**, and **digital transformation** to boardrooms of regulated businesses and growing enterprises. She is valued for her global perspective, strategic vision, and commitment to organizational resilience and growth.

Freda has served as an independent director on both corporate and nonprofit boards for more than a decade, including her current and past roles with **Bank of the Orient**, **Myriad USA**, **Give2Asia**, and the **Piedmont Scouting Council**. She is adept at providing financial and regulatory oversight, ensuring compliance with the US and international standards, and fostering robust risk management frameworks. At Bank of the Orient, a private commercial bank with operations in California, Texas, and China, Freda is Audit Committee Chair and sits on the Asset & Liability and Technology Committees. She was previously Asset & Liability Committee Chair and served on the Risk & Compliance and Loan committees. Freda played a pivotal role in guiding the bank through post-GFC challenges, overseeing recapitalization, CEO transitions, strategic and digital transformation, helping the institution double its assets and regain regulatory standing. At Myriad USA, a nonprofit endowed by King Baudouin of Belgium, she serves as Vice Chair of the Executive Committee and a member of the Investment Committee, overseeing grantmaking to charities worldwide. Freda also provided governance and investment oversight at Give2Asia and the Piedmont Scouting Council.

Freda's executive career is marked by her investment market expertise and ability to drive business growth. As Managing Director and Sr. Portfolio Manager at **Fiduciary Trust International (FTI)**, the \$40 billion AUM wealth management unit of **Franklin Templeton** (NYSE:BEN), Freda led portfolio management in California and other Western States. She was an active member of the firm's Investment Committee, responsible for the evaluation and approval of public and private, traditional and alternative investment funds and managers. Freda led a successful turnaround of the California business, increasing revenue by 50% in two years through new market and digital initiatives, and leveraging Franklin's global distribution and client networks. Previously, as Founder of **Peridot Capital Management**, she advised clients in the US and Europe on cross-border investment and financial planning issues, and as Director of Portfolio Management at **Bingham Osborn & Scarborough**, she was in charge of the firm's largest, most complex portfolios and the portfolio management team. Freda was formerly an investment banker and research analyst at **JPMorgan's** Hong Kong and New York offices, covering the energy and metals & mining sectors. Her real estate expertise is equally robust, with direct experience structuring over \$1 billion in equity and debt investments and raising two closed-end funds (\$250 and \$500 million) at the **Fremont Group**.

Freda holds an **MBA in Finance** from the **Wharton School**, an **MS in Real Estate** from **Columbia University**, and a **BA in Architecture** with High Honors from **UC Berkeley**. She completed the **AI Governance** Director Education Program at **Stanford Law School** and is a **Chartered Financial Analyst** and **NACD** (National Assoc. of Corporate Directors) **Director Certified**. Freda was named one of the **Most Influential Women in Silicon Valley** (Silicon Valley Business Journal 2024) in recognition for her professional achievements and contribution to the community in the areas of sustainability and financial literacy education. She was honored as a **Top 50 Women Leaders in San Francisco** (Women We Admire 2023).