Marjorie Bush-Dixon

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EXECUTIVE PROFILE

Accomplished financial services executive with more than 25 years of progressive experience in fund administration, investor operations, client service delivery, and organizational leadership. Extensive expertise in leading large, multi-jurisdictional teams and overseeing service delivery for institutional clients representing approximately **US$50 billion in assets under management (AUM)**.

Proven ability to drive operational excellence, develop high-performing teams, strengthen client relationships, and implement effective organizational structures that promote accountability, business continuity, and operational resilience. Experienced in executive-level stakeholder engagement, strategic planning, regulatory compliance, talent acquisition, performance management, and compensation strategy.

Recognized for a collaborative leadership approach, sound business judgment, and the ability to align operational resources with complex client requirements and organizational objectives.

CORE COMPETENCIES

- Executive Leadership & Organizational Management
- Fund Administration & Investor Operations
- Multi-Jurisdictional Team Leadership
- Institutional Client Relationship Management
- Client Service Delivery & Operational Excellence
- Assets Under Management (AUM) Oversight
- Strategic Planning & Business Development Support
- Talent Acquisition & Workforce Planning
- Salary, Bonus & Compensation Management
- Performance Management & Employee Relations
- Regulatory Compliance & Policy Implementation

- Operational Risk Management & Business Continuity
- Cross-Training & Succession Planning
- Executive & C-Suite Stakeholder Engagement
- Organizational Change & Process Improvement

PROFESSIONAL EXPERIENCE

MUFG INVESTOR SERVICES (CAYMAN) LTD

September 2000 – April 2026

Progressively promoted through several positions of increasing responsibility, culminating in senior executive leadership roles overseeing investor operations, client service delivery, and organizational management.

Head of Investor Delivery – Cayman
Group Head, Investor Operations
Deputy Investor Operations
Senior Fund Accountant
Fund Accountant

Executive Leadership & Operational Management

- Led large, multi-jurisdictional teams responsible for delivering investor operations and fund administration services to institutional clients with approximately **US$50 billion in assets under management**.
- Oversaw operational service delivery across multiple jurisdictions, ensuring teams consistently met client-specific contractual obligations and service level expectations. Managed a team of 45 staff and 5 direct reports.
- Established effective communication and collaboration between internal departments to deliver a coordinated, seamless client experience aligned with individually negotiated client service agreements.
- Provided strategic direction and operational oversight, ensuring business objectives, service standards, and organizational priorities were effectively communicated and implemented.
- Drove operational consistency through the timely implementation of corporate policies, procedures, and internal controls, ensuring adherence across the teams under my leadership.
- Promoted operational resilience through structured cross-training initiatives, knowledge sharing, and transition planning to mitigate key-person dependency and ensure business continuity.

- Developed management structures that encouraged accountability, employee development, succession readiness, and consistent service delivery.

Talent Management & Organizational Development

- Directed recruitment and hiring activities, including candidate selection, onboarding, and workforce planning across multiple jurisdictions.
- Participated in recruitment decisions and workforce planning to support the teams operational and strategic requirements.
- Exercised management responsibility for employee relations and disciplinary matters, including performance-related terminations
- Managed employee compensation programs, including salary reviews and annual bonus allocations, supporting talent retention and organizational performance objectives.
- Provided leadership and guidance to management teams, fostering a culture of accountability, collaboration, and continuous improvement.
- Oversaw employee performance management and addressed personnel matters, ensuring appropriate documentation and adherence to company policies and procedures.
- Identified opportunities to strengthen team structures through cross-training, resource planning, and effective knowledge transfer.
- Ensured employee performance concerns and disciplinary actions were appropriately documented and managed in accordance with company policies and procedures.

Executive Governance – Cayman Leadership Committee (CLC)- Two Years

Served as a member of the Cayman Leadership Committee, the local governing leadership body responsible for overseeing the Cayman office.

Collaborated directly with C-suite executives and senior leadership on the daily management and operational oversight of the Cayman office.

- Contributed to local business decisions, organizational priorities, staff management, and the effective running of the Cayman operation.
- Supported the implementation of organizational policies and leadership decisions across the local office.

BANCO BILBAO VIZCAYA ARGENTARIA (BBVA)

November 1998 – September 2000

Fund Accountant

- Prepared net asset valuations (NAV) for a substantial portfolio of mutual funds, ensuring accuracy and timely completion of daily fund accounting requirements.
- Liaised with external service providers and vendors to facilitate efficient fund administration and operational delivery.
- Processed wire payment entries and supported related cash management activities.
- Performed shareholder services and maintained fund-related records.
- Supported the day-to-day accounting and administration of mutual funds in accordance with established operational procedures.

LEADERSHIP VALUE PROPOSITION

A seasoned financial services leader combining extensive technical fund administration knowledge with executive-level operational and people management experience. Brings a comprehensive understanding of the institutional fund services environment, from day-to-day fund accounting to multi-jurisdictional operational leadership and local corporate governance.

Demonstrated ability to build sustainable teams, manage complex client relationships, oversee significant institutional portfolios, and balance client expectations with regulatory obligations and business objectives.

LEADERSHIP PHILOSOPHY

Building strong, accountable teams through effective communication, employee development, cross-training, succession planning, and a commitment to consistent, high-quality client service.