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Shaun Patel leads the global team responsible for investor outreach to expand relationships with the firm's largest institutional clients and build strategic partnerships to grow firmwide sales. He is also directly responsible for managing the North American business development and client service initiatives of Research Affiliates. Research Affiliates is a global leader in smart beta, factor investing, and asset allocation. The firm creates investment strategies and tools based on award-winning research and delivers these solutions in partnership with some of the world's premier financial institutions.

Prior to this role, Shaun led US sales for the firm, engaging with the largest public funds, corporations, Taft-Hartley plans, RIAs, and institutional investment consultants to drive growth objectives. He was also responsible for developing and expanding the firm's insurance channel. Before joining Research Affiliates, Shaun served as an assistant vice president at Delaware Investments, now part of Macquarie Group, where he was charged with building partnerships with plan sponsors and investment consultants globally and in the US institutional marketplace. He started his career with Lincoln Financial Group in its Professional Development Program, a rotational track for high-potential talent, before moving to roles of increasing responsibility in sales and client service.

Shaun graduated from Northwestern University with a BS in organizational communication and business institutions. He is a Certified Investment Management Analyst®.