



KKR Names Paula Campbell Roberts Chief Investment Strategist for Private Wealth

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New role deepens KKR's commitment to collaborating with private wealth firms and financial advisors and expanding individual investors' access to its alternative investment strategies

NEW YORK--(BUSINESS WIRE)-- KKR, a leading global investment firm, today announced the appointment of Paula Campbell Roberts as Chief Investment Strategist for Private Wealth. In this newly created role, Ms. Roberts will work closely with KKR's Global Macro, Balance Sheet and Risk team to deliver actionable investment insights to KKR's private wealth partners, which include wirehouses, private banks, independent/regional broker-dealers, registered investment advisors (RIAs) and fintech platforms.

This press release features multimedia. View the full release here: <https://www.businesswire.com/news/home/20230322005102/en/>



Paula Campbell Roberts. (Photo: Business Wire)

"Investors are rethinking the traditional 60/40 portfolio construction model and are increasingly looking towards

alternative investments as a source of uncorrelated returns. Given our nearly five decades of experience investing in alternatives, we believe we are well positioned to help individuals meet their retirement needs," said Todd Builione, Global Head of Private Wealth at KKR. "Paula's appointment underscores our commitment to building a market-leading wealth business that brings the best of KKR's insights and alternative investment strategies to this important and growing segment."

"Having worked closely with Paula for the past seven years, I am confident that her breadth of experience across macroeconomics, deal related work, and asset allocation will make her a trusted resource to financial advisors and our private wealth investors," said Henry McVey, CIO of KKR's Balance Sheet and Head of Global Macro and Asset Allocation (GMAA).

KKR manages nearly \$70 billion in private wealth assets (as of December 31, 2022) through relationships with private wealth firms and a large network of Financial Advisors and RIAs. Currently, individual investors can access KKR's real estate and credit investments through its continuously offered registered funds, [KKR Real Estate Select Trust \(KREST\)](#) and [KKR Credit Opportunities Portfolio \(KCOP\)](#). Beyond real estate and credit, KKR has previously stated that the firm intends to have ways for individuals to access its investments in private equity and infrastructure in 2023. KKR expects private wealth assets to account for 30-50% of its annual fundraising over the next several years.

"I am thrilled to work with Todd, Henry and the private wealth team to deepen our relationships with private wealth firms and Financial Advisors by providing differentiated and trusted insights that help them navigate and thoughtfully incorporate alternative investments into their portfolios," said Ms. Roberts.

Ms. Roberts was most recently Managing Director and Global Head of Consumer and Real Estate Macro and Thematic Investing (CREM). In this role, Ms. Roberts helped drive thematic investing efforts across KKR's global real estate, consumer private equity and credit businesses. Prior to joining KKR in 2017, she was an executive director at Morgan Stanley, where she managed coverage of the U.S. consumer sector. Ms. Roberts is a member of the Federal Reserve Bank of New York's Economic Advisory Panel. She also serves on the board of the American Friends of Jamaica and is a Lincoln Center Leadership Fellow.

About KKR

KKR is a leading global investment firm that offers alternative asset management as well as capital markets and insurance solutions. KKR aims to generate attractive investment returns by following a patient and disciplined investment approach, employing world-class people, and supporting growth in its portfolio companies and communities. KKR sponsors investment funds that invest in private equity, credit and real assets and has strategic partners that manage hedge funds. KKR's insurance subsidiaries offer retirement, life and reinsurance products under the management of Global Atlantic Financial Group. References to KKR's investments may include the activities of its sponsored funds and insurance subsidiaries. For additional information about KKR & Co. Inc. (NYSE: KKR), please visit KKR's website at www.kkr.com and on Twitter @KKR_Co.

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