



## **Gateway Investment Advisers, LLC Adds Portfolio Manager Jonathan Birtwell, Appoints Daniel Santaniello as Head of Sales to Accelerate Growth Plans**

**CINCINNATI and BOSTON — February 4, 2026 —** Gateway Investment Advisers, LLC (“Gateway”), an affiliate of Natixis Investment Managers (“Natixis IM”), today announced two strategic additions to its leadership team as the firm continues to expand its client offerings and accelerate growth across the advisor and institutional marketplace. Cincinnati-based Gateway has nearly 50 years of experience in options-based investment solutions and quantitatively driven equity strategies.

Jonathan Birtwell, CFA, has joined Gateway as Portfolio Manager effective January 26, 2026, bringing extensive experience in macro-driven portfolio construction, risk management and index-options implementation. Additionally, Daniel Santaniello assumed the newly created role of Head of Sales on January 1, 2026. Both join the firm’s Boston office.

Birtwell joins Gateway from Agile Investment Management, where he served as Portfolio Manager and Partner responsible for asset allocation, risk management frameworks, and execution strategies. He previously led portfolio construction and trading functions at PanAgora Asset Management and held portfolio management roles at Natixis Asset Management (now Ostrum Asset Management) and Rafferty Asset Management. He holds an MBA from The Fletcher School at Tufts University, a B.S. from Nichols College, and is a CFA® charterholder.

“Jon’s quantitative discipline and expertise with long-short strategies make him a strong addition to our investment team,” said Mike Buckius, CFA, CEO and CIO of Gateway. “His experience enhances Gateway’s longstanding quant focus and commitment to generating consistent, risk-conscious outcomes for investors.”

“My background has armed me with methods to quantitatively determine the ultimate risk-reward balance for clients,” said Birtwell. “I’m excited to bring what I’ve learned thus far in my career to Gateway and to build trust with the firm’s clients by delivering performance and transparency.”

Santaniello will lead Gateway’s marketing efforts across the firm’s product portfolio, including its mutual funds, ETF and separately managed accounts (SMAs). Working with Joseph Ferrara, Investment Strategist at Gateway, Santaniello will focus on the RIA and Financial Advisor channels and help drive commercial momentum across the firm’s Extension and Single-Stock Hedging and Monetization solutions. Santaniello’s appointment follows a 28-year career at Natixis IM, where he served as an internal wholesaler, external salesperson and ultimately as National Sales Manager for the Fiduciary Development Unit. He holds a B.S. in finance from Western New England University.

“Dan has a deep understanding of the advisor marketplace,” said Buckius. “The combination of his strong relationships, strategic discipline, and sales leadership skills will be invaluable as Gateway continues to scale its capabilities in response to growing demand from advisors and their clients for customizable, tax-aware investment strategies.”



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"Gateway's capabilities are exactly what advisors are seeking today—repeatable risk-managed equity, cash-flow generation and tax-aware implementation for their clients," said Santaniello. "My focus is making it easier for advisors to evaluate, understand and implement the capabilities that Gateway offers, while building the processes required to scale our growth."

These leadership additions follow Gateway's August 29, 2025 asset acquisition of Belmont Capital Group, which expanded the firm's capabilities in single-stock risk management, tax-aware overlay solutions, and customized separately managed accounts. With the integration of Belmont's expertise, Gateway has garnered growing interest in its tailored hedging and options SMA strategies, including for high-net-worth individuals with concentrated equity positions.

### **About Gateway Investment Advisers**

Based in Cincinnati, Ohio, Gateway Investment Advisers, LLC specializes in quantitatively driven equity portfolio management and index options-based investing. Since 1977, the firm has maintained a consistent focus on reducing the risk of equity investing and enhancing cash flow with option strategies. Gateway's core low-volatility strategy seeks to capture the majority of the returns associated with equity market investments, while exposing investors to less risk than other equity investments. The firm, which has been an affiliate of Natixis Investment Managers since 2008, had approximately \$11.5 billion in assets under management as of December 31, 2025.

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