



## FactSet Appoints Helen Shan as Chief Financial Officer

July 23, 2024

*Current FactSet Executive Goran Skoko to Take on Role of Chief Revenue Officer*

*Company Reaffirms Full-Year Fiscal 2024 Guidance*

NORWALK, Conn., July 23, 2024 (GLOBE NEWSWIRE) -- FactSet ("FactSet" or the "Company") (NYSE:FDS) (NASDAQ:FDS), a global financial digital platform and enterprise solutions provider, today announced that Helen Shan, a seasoned FactSet executive who currently serves as Executive Vice President and Chief Revenue Officer, has been appointed Chief Financial Officer, effective immediately. Shan succeeds Linda Huber, who is transitioning out of the Company.

Shan brings extensive financial leadership experience and business expertise within FactSet, and is rotating back into the CFO role, which she previously held from 2018 to 2021 before being appointed Executive Vice President and Chief Revenue Officer. As CFO, she executed a successful financial strategy, which included investments in digital and content capabilities that expanded FactSet's solutions and accelerated revenue growth. She advanced the Company's financial processes and infrastructure, including disciplined value-based pricing and the transformation of financial systems, helping to drive increased margins and earnings. In her role as Chief Revenue Officer, Shan aligned and enhanced FactSet's go-to-market execution, deepened senior client relationships and oversaw over \$300 million of organic growth in annual subscription value.

"Helen has been an integral member of our executive team for the past six years, helping position FactSet as the leader we are today," said Philip Snow, Chief Executive Officer of FactSet. "She has played a pivotal role in overseeing our multiyear investment plan and growing our market share through many cycles. As we look to our next phase of profitable growth, I am confident that Helen's broad financial and strategic expertise, combined with her recent sales leadership experience, will be invaluable as we work to deliver long-term value to our shareholders."

Shan said, "I believe in the significant value FactSet provides to financial decisionmakers. Our clients want tangible and flexible workflow solutions. Thanks to the investments we've made in technology, content and our infrastructure, we are delivering high-quality data and analytics in a connected and open platform. The way we win is by aligning strategy and execution across the organization to drive top-line growth. I look forward to further leveraging my diverse experience to drive increased value for our clients, shareholders and colleagues."

Goran Skoko, Executive Vice President, Managing Director, EMEA and Asia Pacific and Head of Dealmakers and Wealth at FactSet, will take over as Chief Revenue Officer, effective September 1, 2024. Drawing on his two decades of sales, product, and engineering experience at FactSet, Skoko is a natural fit to lead FactSet's sales organization. He has achieved success in building the Company's Wealth Management business, expanding market share, and forging strong and extensive global client relationships, as well as leading some of FactSet's largest sales efforts.

Snow continued, "We are fortunate to have a deep bench of talent at the Company. I am confident Goran and Helen's cross-functional strengths and leadership will continue enhancing our go-to-market strategy to deliver positive results. Given their deep expertise and proven partnership within FactSet, we expect a seamless transition to these new roles."

Snow concluded, "Linda has had a material impact during her three-year tenure at FactSet. She established FactSet's first public bond deal and debt rating, which enabled us to finance the acquisition of CUSIP, and continued to advance our capital allocation and expense management discipline. On behalf of our entire team, I want to thank Linda for her contributions as CFO, and we wish her all the best in her future endeavors."

Huber's departure is not the result of any disagreement with the Company regarding its accounting practices, financial statements or financial condition, or any of the Company's related disclosures.

FactSet today reaffirmed its full year fiscal 2024 guidance, as previously provided on June 21, 2024.

### **About FactSet**

FactSet (NYSE:FDS | NASDAQ:FDS) helps the financial community to see more, think bigger, and work better. Our digital platform and enterprise solutions deliver financial data, analytics, and open technology to nearly 8,000 global clients, including over 206,000 individual users. Clients across the buy-side and sell-side as well as wealth managers, private equity firms, and corporations, achieve more every day with our comprehensive and connected content, flexible next-generation workflow solutions, and client-centric specialized support. As a member of the S&P 500, we are committed to sustainable growth and have been recognized amongst the Best Places to Work in 2023 by Glassdoor as a Glassdoor Employees' Choice Award winner. Learn more at [www.factset.com](http://www.factset.com) and follow us on X and LinkedIn.

### **Forward-looking Statements**

This news release contains forward-looking statements based on management's current expectations, estimates, forecasts and projections about industries in which FactSet operates and the beliefs and assumptions of management. All statements that address expectations, guidance, outlook or projections about the future, including statements about the Company's strategy for growth, product development, revenues, future financial results, anticipated growth, market position, subscriptions, expected expenditures, trends in FactSet's business and financial results, are forward-looking statements. Forward-looking statements may be identified by words like "expects," "believes," "anticipates," "plans," "intends," "estimates," "projects," "should," "indicates," "continues," "may" and similar expressions. These statements are not guarantees of future performance and involve a number of risks, uncertainties and assumptions. Many factors, including those discussed more fully elsewhere in this release and in FactSet's filings with the Securities and Exchange Commission, particularly its latest annual report on Form 10-K and quarterly reports on Form 10-Q, as well as others, could cause results to differ materially from those stated. Forward-looking statements speak only as of the date they are made, and FactSet assumes no duty to and does not undertake to update forward-looking statements. Actual results could differ materially from those anticipated in forward-looking statements and future results could differ materially from historical performance.

Investor Relations Contact:  
Ali van Nes  
+1.203.810.2273  
[avannes@factset.com](mailto:avannes@factset.com)  
[investor\\_relations@factset.com](mailto:investor_relations@factset.com)

**Media Contact**

Arielle Sweitzer  
+1.203.512.2194  
[arielle.sweitzer@factset.com](mailto:arielle.sweitzer@factset.com)

**FACTSET**