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Executive Qualifications for Board Positions

25 years of experience as an investment professional: Fortune 50 retirement plan sponsor; global corporate treasury executive; ran three investment advisors, two broker dealers and two mutual fund complexes. Unique visionary with founder / entrepreneurial experience tempered by real-world wisdom and discernment. Seven times CEO; CFA; and securities licenses.

For full resume please see: <http://www.4hopeinvmt.com/Text-Resume.html>

Board Experience / Duties / Tenure

Name	Type	Duties*	Years
1) Caterpillar Pension Board	Corp	Serv, Dir	10
2) Caterpillar Inv. Mgt. Ltd.	Inv Adv	Serv, Dir	7
3) Caterpillar Securities Inc.	BD	Serv, Dir	7
4) The Preferred Group of Mutual Funds	MF	Serv, Dir	5
5) Endeavor Group	BD	Serv	4
6) Endeavor Management Co.	Inv Adv	Serv	4
7) Endeavor Series Trust	MF	Serv**	4
8) alpha Partners Inv. Mgt.	Inv Adv	Serv, Dir	2
9) 4Hope Inv. Mgt LLC	LLC	Serv, Dir	4+
10) The 4Hope Foundation	Non Prof	Serv, Dir	3+

“Serv” = due diligence and meeting presentation, “Dir” = Director, Trustee, Chairman
“Serv**” = post acquisition, as CEO of EMC, facilitated EST board meetings for 2 years.
“+” = currently serving.

Keywords to describe experience, character and deliverables:

Book Smart	Fiduciary	Sleeves rolled up	Communicator
Street Smart	Trustworthy	Selectively Tenacious	Compliance
Current	Golden Rule	In house and out	Partner / Pro
Tireless/Diligent	Bd. Rm. Savvy	State Street/TNT/BFDS...	Success!