# Multi-Asset Research Team



**Laton Spahr, CFA**President and Portfolio Manager

MS, Finance, University of Wisconsin-Madison, Applied Security Analysis Program BS, Finance & Accounting, University of Wyoming

## **Prior Experience:**

- OppenheimerFunds, Portfolio Manager and Team Leader
- ColumbiaThreadneedle, Portfolio Manager and Team Co-Leader
- · Holland Capital Management, Analyst

Focus: Equities

Years of Experience: 26



**Eric Hewitt** 

Co-Chief Investment Officer, Portfolio Manager

MBA, Finance, University of Minnesota Carlson School of Management

BA, Political Science, University of Wisconsin-Madison

# Prior Experience:

- OppenheimerFunds, Portfolio Manager and Analyst
- Diamondback/Harbor Watch, Long/Short Portfolio Manager
- AllianceBernstein, Portfolio Manager & Global Head of Consumer Research
- · Lehman Brothers, Fixed Income Trading

Focus: Equities

Years of Experience: 29



Alex Hagmeyer, CFA

Co-Chief Investment Officer, Senior Director Ouantitative Research

BA, Microbiology, Miami University

### **Prior Experience:**

- Franklin Templeton Investments, VP Quantitative Equity Research
- Quantitative Services Group, Senior Quantitative Analyst

Focus: Quantitative, Engineering, Fixed Income

Years of Experience: 17



Robert McClure

Director of Research

MBA, Finance, Loyola University Chicago BA, Economics, University of Illinois at Urbana-Champaign

### **Prior Experience:**

- OppenheimerFunds, Client Portfolio Manager Domestic Equities
- Credit Suisse HOLT, Portfolio Consultant

Focus: Equities

Years of Experience: 27



Chris Proctor, CFA

Director of Research, Fixed Income

BA, Economics, Trinity University

# **Prior Experience:**

- OppenheimerFunds, Fixed Income Team Leader & Portfolio Manager
- Scudder-Kemper Investments, Portfolio Manager
- · E\*Trade Global Asset Management, Head of Credit

Focus: Fixed Income

Years of Experience: 31



# Richard Baker, CAIA

Director of Research, Real Assets and Alternatives

MBA, Finance, University of Washington Foster School of Business

BS, Computer Science, University of Cincinnati

#### **Prior Experience:**

- Red Rocks Capital, Private Markets Strategist
- · Deloitte Consulting, Engagement Manager
- CommNet Cellular, CTO

Focus: Real Assets and Alternative Investments

Years of Experience: 31



# Multi-Asset Research Team



Warren Beth, CFA Chief Equity Strategist

MBA, University of Denver BA, English, University of Alabama

# **Prior Experience:**

• Red Rocks Capital, Equity Analyst

Focus: Equities

Years of Experience: 11



Jimmy Wenger

Real Assets Strategist

MS, Finance and Risk Management, University of Colorado at Denver

BS, Business Administration, University of Northern Colorado

## **Prior Experience:**

• ALPS Fund Services, Expense Analyst

Focus: Real Assets, Engineering

Years of Experience: 6



**Bobby McLaughlin, CFA** Senior Quantitative Strategist

BBA, International Finance & Marketing, University of Miami

#### Prior Experience:

- Franklin Templeton, Quantitative Equity Research
- Franklin Templeton, Trader

Focus: Engineering, Quantitative

Years of Experience: 11



Jeremy Rapp

Lead Software Engineer

BS, Electrical & Computer Engineering, University of Colorado Boulder

BS, Applied Mathematics, University of Colorado Boulder

### **Prior Experience:**

• The Rothwell Group, Senior Software Engineer

Focus: Engineering

Years of Experience: 9



**Dave Munn** 

Senior Software Engineer

BS, Software Engineering, University of Northern Colorado BS, Business Administration (Accounting Emphasis), University of Northern Colorado

## **Prior Experience:**

- Mortgage Cadence an Accenture Company
- · Agilutions Consulting Inc.

Focus: Engineering

Years of Experience: 6



**Dane LeBlanc** 

Software Engineer

MS, Instructional Technology, Fort Hays State University BA, Physics Education, University of Evansville

### **Prior Experience:**

• Stargate Charter School, Physics Instructor

Focus: Engineering

Years of Experience: 2

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