

# Multi-Asset Research Team



**Laton Spahr, CFA**  
President, 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:** 27



**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 and Global Head of Consumer Research
- Lehman Brothers, Fixed Income Trading

**Focus:** Equities

**Years of Experience:** 26



**Alex Hagmeyer, CFA**  
Co-Chief Investment Officer, Senior Director  
Quantitative 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:** 18



**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:** 28



**Chris Proctor, CFA**  
Director of Research, Fixed Income

BA, Economics, Trinity University

**Prior Experience:**

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

**Focus:** Fixed Income

**Years of Experience:** 32



**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:** 32



**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:** 12



**Jimmy Wenger, CFA**  
Real Assets Strategist

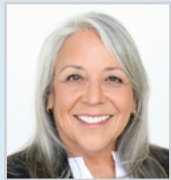
MS, Finance and Risk Management,  
University of Colorado – Denver  
BS, Business Administration,  
University of Northern Colorado

**Prior Experience:**

- ALPS Fund Services, Expense Analyst

**Focus:** Real Assets, Engineering

**Years of Experience:** 7



**Amy Trujillo-Marjerison**  
Investment Advisory Analyst

BS, Finance, Metropolitan State University

**Prior Experience:**

- Red Rocks Capital, Operations/Trading Specialist
- Marsico Capital Management, Client Services Administrator
- Colorado Capital Advisors, Operations Specialist

**Focus:** Operations, Trading

**Years of Experience:** 28



**Sahra Tzortzis**  
Director, Managed Accounts Trading

MBA, University of Denver  
BA, Economics, Colorado State University

**Prior Experience:**

- Charles Schwab, Senior Manager Trading and Operations
- Janus Henderson, Fixed Income Portfolio Analyst
- OppenheimerFunds, Lead Fixed Income Trading Assistant

**Focus:** Operations, Trading

**Years of Experience:** 17



**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:** 12



**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:** 10



**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:** 7



**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:** 3

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