

Certified Investment Management Analyst, CIMA®

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Professional Designations & Licenses

Certified Valuation Analyst (CVA)

National Association of Certified Valuators and Analysts (NACVA)

Registered Representative

Financial Industry Regulatory Authority (FINRA)
(Licenses: Series 7- General Securities Representative, Series 24 – General Securities Principal, Series 66 – Uniform Combined State Law)
(1998 to 2011)

Accredited Investment Fiduciary Analyst (AIFA)

Fiduciary360 (2004 to 2011)

Education

Rollins College, Winter Park, Florida

B.A. Organizational Behavior

Professional Experience

Gryphon Valuation Consultants, Inc. – Las Vegas, NV

Vice President/Valuation Analyst, November, 2010 to present

The Investment Counsel Company of Nevada – Las Vegas, NV

President/Investment Analyst & Consultant, 1996 to 2011

The Investment Counsel Company of the S.E. – Orlando, FL

Senior Vice President/Securities Analyst & Trader, 1986 to 1996

Professional Memberships and Associations

National Association of Certified Valuators and Analysts (NACVA)

Member, 2013 to present

Investment Management Consultants Association (IMCA)

Member, 1999 2013

Financial Industry Regulatory Authority (FINRA)

Registered Representative, 1998 to 2012

Fiduciary360

(Formerly: Center for Fiduciary Studies)

Member, 2004 to 2011

Community and Other Organizations

Assistance League of Las Vegas

Desert Sage Auxiliary—2000 to 2008. Past Secretary (2002/03), Treasurer (2005)

Building Endowment – Investment Committee – 2007 to 2011

Lied Discovery Children's Museum

Board of Trustees—2000 to 2002