

A Team Approach with All Clients

320 Client Families

One investment philosophy

One client approach

One set of consistent services

FOUNDERS, MENTORS & MANAGEMENT



Keith Matthews, MBA, CIM®
Managing Director &
Portfolio Manager



Don Tulett, CIM®
CCO & Portfolio Manager



Michael Baldoni, CAMS
Director of Compliance
and Operations

INVESTMENT MANAGERS



Ruben Antoine, CFA, CPA
Portfolio Manager



Marcelo Taboada, CIM®
Associate Portfolio Manager



Lawrence Greenberg, CFA
Associate Portfolio Manager



Jackson Matthews, CIM®
Associate Portfolio Manager



Edmond Fhima, F.Pl.
Manager of Tax &
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Julie Desrosiers, CIM®
Associate Portfolio Manager

TAX & PLANNING

TRADING

INVESTMENT ASSOCIATES



Chloe Mainguy
Investment Associate



Meghan McCarthy
Investment Associate

CLIENT SERVICES & OPERATIONS ASSOCIATES



Cindy Perera
Manager of
Client Services



Oxana Timbaliuc
Client Services Associate



Karin Oram
Client Services Associate



Andrea LeRoyer
Tax & Client Services Associate