



## Thomas R. Scholz, CFA, CIPM Research Analyst

Tom is responsible for analysis of managers and funds. In this role, he is regularly in contact with investment managers and contributes analysis for use throughout the organization. Tom brings invaluable investment industry experience to his role at Cleary Gull Advisors. He works closely with our senior professionals and portfolio managers providing investment and portfolio analytics, due diligence on new investment opportunities and reporting support for institutional client relationships.

Prior to joining Cleary Gull Advisors, Tom was the manager of the Analytics Group at Harris Associates, L.P. in Chicago, IL, where he

worked for eight years. Before joining Harris Associates, he served as a risk and performance analyst at Goldman Sachs in London, UK. Tom also has work experience as an English Teacher in Buenos Aires, Argentina and as an Investment Accountant at American Express Financial Advisors in Minneapolis, Minnesota. He has passed the CPA exam and currently serves as an advisor to the CFA Institute serving on the CIPM Examination Review Panel. Tom majored in Finance and Accounting at the University of Wisconsin-Madison and received his MBA from the University of Chicago.

### *Cleary Gull Advisors Inc.*

With decades of experience, we combine a unique blend of investing acumen with independence and objectivity to create custom portfolios designed to address both short- and long-term goals. Our comprehensive methodology assists clients with building and monitoring investment portfolios given their unique underlying purpose of their assets.

Our select group of clients, representing over \$5.0 billion under management, benefit from a rigorously objective approach that emphasizes fundamental research and portfolio construction. A strong entrepreneurial spirit fosters a culture that brings forth and values new ideas. Cleary Gull Advisors is a wholly-owned subsidiary of Cleary Gull Holdings Inc., a privately held, employee-owned organization.