

BUILDING BETTER PORTFOLIOS

Loring Ward Investment Committee

The Investment Committee defines investment objectives, determines investment strategies and monitors investment solutions to help meet both the current and future needs of investors and create a better wealth experience.



Harry M. Markowitz, PhD

Harry M. Markowitz is best known for winning the Nobel Prize in Economic Sciences in 1990 for his work on portfolio selection. In his distinguished career, Dr. Markowitz has served in various academic posts at many universities, including Rutgers University and UCLA. Recognized as the father of Modern Portfolio Theory, Dr. Markowitz is a professor of finance in the Rady School of Management at UC San Diego. He received his PhD in Economics from the University of Chicago.



Meir Statman, PhD

Meir Statman is the Glenn Klimek Professor of Finance at the Leavey School of Business, Santa Clara University. His research focuses on how investors and managers make financial decisions and how these decisions are reflected in financial markets. His research has been published in many publications, including *The Journal of Finance* and *The Journal of Financial Economics*. Dr. Statman received his PhD from Columbia University.



Alex Potts

President & Chief Executive Officer, Loring Ward

Alex Potts is the President and CEO of Loring Ward Group Inc. and of the SA Funds – Investment Trust. Previously, he was the Chief Operating Officer of LWI Financial Inc. Potts earned a Bachelor of Science Degree in Economics from Santa Clara University.



Sheldon P. McFarland

Vice President, Portfolio Strategy & Research, Loring Ward

Sheldon McFarland serves as Vice President of Portfolio Strategy & Research at Loring Ward. His responsibilities include management of the Portfolio Strategy Group, oversight of the Investment Planning Center and development of tools to support Advisors. McFarland earned his MBA from Santa Clara University and a Bachelor of Science in Business Management from Brigham Young University.

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