**Barron's Boston & Detroit Regional Summit 2015 bios – Wolcott Wheeler**

**David Kudla**

**Mainstay Capital Management**

David is the founder, chief executive officer, and chief investment strategist of Mainstay Capital Management, LLC, with more than $2 billion in assets under management. He is a contributing writer for Dow Jones and *Forbes* who often speaks at national conferences and regularly appears on CNBC, Bloomberg and FOX Business and in the financial press. For the past six years, he has been recognized as a *Barron’s* Top 100 Independent Financial Advisor. In his philanthropic activities, he is the founder and Executive Director for ENGAGE - International Investment Education Symposium, the world’s largest student investment conference held in 2015. He is also a university adjunct professor and serves on several university advisory councils. He has earned two post-graduate degrees, including a master’s degree in management from Stanford University.

**Frank Jennings**

**OppenheimerFunds**

Frank is a portfolio manager of the Global Multi Cap Growth and related strategies at OFI Global Asset Management, a part of OppenheimerFunds. Prior to joining the firm, he was with Paine Webber Mitchell Hutchins, AIG Global Investors, Prudential Insurance Company, and Gulf and Occidental Investment Company in Geneva, Switzerland. He holds a B.A. in economics from Emory University and a Ph.D. in economics from the University of Geneva, Switzerland.

**George Evans**

**OppenheimerFunds**

George is a portfolio manager of the International Growth Strategy and related strategies at OFI Global Asset Management, a part of OppenheimerFunds. He is also Chief Investment Officer of Equities for the firm. Before joining the firm, he worked at Brown Brothers Harriman. He earned a B.A./M.A. from Oxford University and an M.B.A. from the Wharton School of the University of Pennsylvania and holds the Chartered Financial Analyst designation.

**Greg Miller**

**Wellesley Investment Advisors**

Greg is the CEO and co-founder of Wellesley Investment Advisors. With over thirty years of investment and financial experience, he is a nationally recognized provider of investment advisory services deploying convertible bonds. He began his career with PricewaterhouseCoopers (formerly Coopers & Lybrand). In 1991, Darlene Murphy and Greg formed Wellesley Investment Advisors in response to increased demand for investment advice from clients. He is the author of an Amazon bestselling book, *Outrunning the Bear: How You Can Outperform Stocks and Bonds with Convertibles*. For four consecutive years, he has been ranked a Top 100 Independent Financial Advisor by *Barron’s*. In 2015, *Barron’s* ranked him #1 in Massachusetts in its list of the Top 1,200 Financial Advisors. He graduated from Boston University with a Bachelor of Science degree in Business Administration and holds a Master of Business Administration in Finance with high distinction from Babson College.

**Peter Noonan**

**J.P. Morgan Securities**

Peter is a Managing Director and Financial Advisor with J.P. Morgan Securities, the wealth management division of J.P. Morgan. He manages relationships for high-net-worth individuals, including athletes, entertainment figures and private equity executives. He carefully assesses the risk profile of his clients and then creates appropriate strategies leveraging the breadth of J.P. Morgan’s extensive investment platform designed to meet their needs. He has been recognized by *Barron's* for the fourth consecutive year in a row. In 2014, *Barron’s* named him one of the Top 1,200 Financial Advisors in America. He has 30 years of financial services industry experience, beginning with Lehman Brothers in 1983, various companies comprising UBS from 1986-1999, and Robertson Stephens from 2000-2002. He joined J.P. Morgan Securities’ predecessor firm, Bear Stearns, in 2002, before it became part of J.P. Morgan in 2008. He graduated from Bates College with a B.A. degree in Economics.

**Keith Rowling**

**Morgan Stanley**

Keith is a Managing Director with The Detroit Group at Morgan Stanley who has been in the financial services industry for over 11 years. He graduated from the University of Notre Dame in 2004 and started his career at UBS Paine Webber upon graduation. He began working as an intern at UBS Paine Webber at the age of 16 with Martha Adam, a veteran in the financial advisory industry. In 2008, he transitioned his business to Morgan Stanley and has become one of the top advisors with the firm. He is one of the youngest managing directors at Morgan Stanley and a member of the Chairman’s Club. He has been ranked #8 by OnWallStreet as a Top 40 under 40 Advisor and ranked #9 by *Barron’s* as a Top Advisor in Michigan.

**Melissa Spickler**

**Merrill Lynch**

Missy is the founder of The Spickler Wealth Management Group at Merrill Lynch, where she is a Managing Director - Wealth Management. She joined Merrill Lynch in 1980 and today helps motivate, advise and guide women in transition, executives, closely held businesses, retirees and entrepreneurs as they pursue their financial goals and aspirations. Some clients have chosen to remain with her for more than three decades, and a number of her relationships span four generations. She was named to *Barron’s* list of America’s Top 100 Women Financial Advisors in 2012, 2013 and 2014. In 2014 and 2015, *Barron’s* listed her among America’s 1,200 Top Financial Advisors by State. She was featured on the cover of the September 23, 2013, issue of *Barron’s*. After graduating from Michigan State University with a Bachelor’s degree in Criminal Law, she became an undercover agent for the Michigan Attorney General. She holds the Chartered Retirement Planning Counselor (CRPC) designation.

**Paul Blease**

**CEO Advisor Institute**

Paul is the director of CEO Advisor Institute, with more than 25 years of experience in the financial services industry. He has served as a successful financial advisor, as a branch and complex manager at Merrill Lynch, and as a senior executive responsible for designing and developing Smith Barney’s Advanced Business Development and Team Training Program.

Now, as a nationally recognized thought leader, he helps financial advisors and complex managers review and transform how they run their businesses, lead their teams and balance their lives. By challenging many of the financial industry’s fundamental assumptions, his provocative and entertaining presentations offering compelling alternatives and solutions.

**Raju Pathak**

**Morgan Stanley**

Raj is a Managing Director and Wealth Advisor at Morgan Stanley. A widely-recognized leader in the greater Boston financial advisor community, he focuses on providing wealth management solutions to business owners, corporate executives and emerging entrepreneurs throughout the greater Boston area. Together with his team, he helps clients address their five biggest concerns: preserving their wealth; mitigating taxes; taking care of their heirs; ensuring their assets are not unjustly taken; and charitable giving. He has been with Morgan Stanley for over 28 years and now serves a limited number of clients who have entrusted him with over $850 million in assets. He uses a consultative process to gain a detailed understanding of each client’s values and goals, and then shares customized recommendations designed to address each client’s unique needs and long-term objectives, which frequently extend well beyond just investments and often encompass aspects such as insurance, estate planning, and liability management.