

## Professional

Attuned to the rapidly changing complex world of asset management.

### David Wheeler Managing Director and Chief Investment Officer.

Prior to founding W&M, Dave was a senior officer with several major institutional consulting and investment management firms.

He was a member of the Management Committee and led the South Region corporate, non-profit, and public funds investment consulting practice of SEI Capital Resources. Dave also headed the Pension Department of Lincoln National Insurance Company and provided investment management services to insurance companies and top tier institutional investors.

In other previous experience, Dave served as Senior Vice President and Investment Policy Committee member for C&S Investment Advisors and Senior Vice President for Securities Management and Research. He also served as a regional CEO for Wachovia Bank.

Dave is a graduate of Duke University and of the University of Pennsylvania Wharton Business School Money Management and Pension Funds program. He holds Series 63, 7, 65, and 24 securities registrations, and a North Carolina real estate broker license.

Dave is officed in Mount Dora (metro Orlando).

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### Ross Butler

**Region Manager and Senior Advisor,  
manages West Coast client relationships.**

During the Reagan and Bush administrations, Ross served on the Vice President's Aerospace Council which established and implemented commercial aerospace policy.

After the cold war ended, Ross founded a software development company that was sold to the Central AeroHydrodynamics Institute (TsAGI – Russia's equivalent of NASA). Afterward he served as Director of North American Operations for the Institute.

Ross later served as International Controller of an Internet based infomediary before entering the securities industry to run an independent retirement planning group with Securities America that specialized in 401(k) plans.

He is a Brigham Young University Graduate with a business finance degree. Ross holds Series 7 and 66 securities and California real estate licenses.

He is officed in Alamo (metro San Francisco).