

PATRICIA A. ALEXANDER, CLPF

Background

For over thirty years, I have been involved in institutional and private investment management. During that time, an increasing number of clients, attorneys and other trusted advisors have asked me to serve as a private trustee. It was evident that there is a large, unmet need for a professional trust management alternative. After much reflection and consultation with our existing clients and the legal community, I decided to respond to my clients' needs by expanding my professional services to include serving as a private trustee and in related fiduciary capacities. I became a licensed Professional Fiduciary by the California Professional Fiduciaries Bureau (License No. 388). I then founded my own firm, Professional Trust Management Group, in Pasadena, California. I currently serve as court-appointed trustee, administrator or fiduciary in a variety of matters. [See addendum.]

My investment management career began in 1988 with Hotchkis and Wiley, a well known institutional investment management firm. I worked in a number of capacities and was one of the founding members of Hotchkis & Wiley International. After the firm was acquired by Merrill Lynch, I decided to focus on private clients. Successfully passing examinations for NASD Series 7, 63 and 66 licenses in 2002, I joined G. E. Pia & Company (Mission Street Wealth Planning), a Registered Investment Advisor with which I am still affiliated. A substantial portion of my practice involves the management of trust portfolios and advising trustees and other fiduciaries. My relevant professional background also includes over ten years of paralegal and law office management experience including probate, guardianship and civil litigation.

I am a second generation Californian. I graduated from Mount St. Mary's College with a Bachelor of Music degree. I reside in Pasadena where my husband and I raised four sons.

I am a member of the Professional Fiduciaries Association of California (PFAC) and the National Center for Employee Ownership. I am involved in a variety of professional and community organizations and activities. I am a former member of the curriculum committee and admissions committee of St. Monica Academy and a former board member of Serendipity Community School.