Patricia A. Alexander

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Licenses/Registrations

- Professional Fiduciary, California License No. 388
- Securities registrations: Series 7, 63 and 66 (not currently registered with a FINRA firm)
- National Guardianship Association

Employment

Private Trust Management Group — **Pasadena, CA**
Professional Fiduciary/Investment Counsel — **2009 - Present**

- Private Trustee
- Administrative Trustee
- Administrator or Executor of the Estate
- Investment management
- Forensic reviews
- Litigation support
- ESOP Trustee

MISSION STREET WEALTH PLANNING, Registered Investment Advisor — **Pasadena, CA**
Investment Advisor Representative (Mission Street Wealth Planning) — **2003 – Present**

- Work closely with trustees, lawyers and accountants in the management of trust assets.
- Advise and manage investment portfolios for high net worth individuals.
- Pension plan analysis of plan investment selection and asset allocation.

Experience

Crowell Weedon & Co. — **Pasadena, CA**
Financial Advisor — **2002 – 2003**

- Investment Advisor/Stockbroker

Hotchkis and Wiley, a Division of Merrill Lynch — **Los Angeles, CA**
Manager – Client Services and Relations – International/Global Equity Dept. — **1996 - 2000**

- Defined, established, developed and managed the client services department for the international/global equity group for U.S. and non-U.S. clients.
- Analyzed client portfolios to ensure compliance with investment disciplines and guidelines.
- Responsible for interpretation and analysis of portfolio performance as well as explanation to portfolio managers, clients and consultants in a clear and concise manner.
- Organized and managed client reporting and support department.
- Developed proprietary system for client reports.
- Developed proprietary system for portfolio attribution analysis.

Hotchkis and Wiley International — **Los Angeles, CA**

- **Founding Member** — **1990 - 1996**
- **Investment Committee Member**

Manager/Research Analyst
As one of the founding team members, I organized and managed all non-portfolio management functions of the department. During this period, my responsibilities also included:

Client Relations/Marketing

- Client relations
- Client reporting

- Due diligence meetings with consultants and prospective clients
- Oversight of responses to Requests for Proposals (RFP's) and consultant questionnaires

Performance
- Calculation of composite returns
- Reviewed portfolio returns; resolved performance issues
- Attribution analysis

Compliance
- Responsible for ensuring portfolios managed within client guidelines
- Construction and calculation of HWI Composites within AIMR guidelines

Research/Database Management
- Responsible for all research programs as well as historical databases
- Evaluated, recommended and implemented software programs/databases used in research and analysis
- Designed and implemented proprietary spreadsheets including weekly stock screens

HOTCHKIS AND WILEY — **LOS ANGELES, CA**
Marketing Associate — **1988 - 1990**

- Responsible for preparation of responses to RFP's and consultant questionnaires
- Prepared marketing materials and client reports

ALEXANDER & HUGHES — **DOWNEY, CA**
Director of Operations — **1980 - 1988**

- Supervised law clerks, paralegals, document production and support staff
- Extensive contact with clients, attorneys, and courts
- Responsible for client trust account, accounts payable and receivable

EDUCATION

Mount St. Mary's College
Bachelor of Music

PROFESSIONAL MEMBERSHIPS

- Professional Fiduciary Association of California (PFAC)
- National Guardianship Association

ACTIVITIES

Piano, choral singing, gardening, making hand-dipped chocolate truffles.