

PRIVATE BANKING & WEALTH MANAGEMENT

STUDENT
REGISTRATION



David (Dave) R. Covin

COO and CFO, Fremont Group

David (Dave) R. Covin is the Chief Operating Officer and Chief Financial Officer of Fremont Group, a San Francisco-based private investment office for the Bechtel family that specializes in direct investments, real estate, venture capital, and publicly-traded securities. Dave directly oversees BF Global, a portfolio that invests in publicly-traded securities and forms long-term partnerships with exceptional investment managers. Dave has over twenty-five years of experience in a variety of roles with major global financial services and consulting firms. After graduating from Princeton, Dave spent eleven years with Goldman Sachs in their derivatives group with experience in trading, marketing, structuring, and risk management of credit, equity and interest rate products. In 2006, he joined McKinsey & Company and was a partner and senior member of the Corporate and Investment Banking practice.



KARIM AHAMED

Partner, Cerity Partners

Karim Ahamed is a partner and investment advisor in the Chicago office of Cerity Partners, a leading independent wealth management firm serving the complex needs of wealthy families, corporate executives, business owners, and charitable organizations. In addition to his client responsibilities, Mr. Ahamed is a member of the investment committee and head of the firm's manager selection activities. Additionally, in his role as investment strategist for the firm, Mr. Ahamed authors the firm's market outlook, identifies key investment themes and trends to be expressed in client portfolios, and helps to develop and implement the firm's strategic and tactical positioning for portfolio management. Prior to joining Cerity Partners, Mr. Ahamed was a managing director and senior investment specialist with J.P. Morgan Private Banking, where he was ranked among the nation's top investment advisors by Barron's magazine. Earlier in his career, Mr. Ahamed held senior investment and wealth management positions with Coutts & Co. and UBS AG in the UK. Mr. Ahamed received his Bachelor of Arts degree from William & Mary and his Master of Management degree from the Kellogg School of Management at Northwestern University. He is a CFA charterholder and member of the CFA Institute, CFA Society of Chicago and CFA Society of the UK. Mr. Ahamed serves on the boards, and professional advisory committees of several non-profit organizations focused on arts, education and economic development. An avid supporter of the Mason School of Business, he currently chairs the investment committee of the Mason School of Business Foundation board. Additionally, Mr. Ahamed is a regular participant in DoG Street to Wall Street and has been part of the highly-ranked Applied Financial Concepts course since its inception.



ROMA KORKMAZSKY '11

VP, JP Morgan Asset Management

Roma Korkmazsky is a Vice President and Investment Specialist at JP Morgan's Private Bank. In this capacity, he provides customized investment solutions, builds portfolios, and provides tailored advice to wealthy individuals and families across the tri-state area. Prior to his current role, Mr. Korkmazsky advised Private Bank clients located primarily in New Jersey on aspects of investments, banking, and estate planning. He began his career working with corporations to manage foreign currency exposure through derivative risk management. Mr. Korkmazsky is a graduate of William & Mary where he earned a BBA in Finance and Accounting. He is a CFA charterholder and a member of the CFA Institute. He currently lives in New York City and enjoys running, traveling, reading, and rooting for The Yankees.



JENNIFER GUTHRIE '06

CFA Client Advisor, JP Morgan Private Bank

More Information to come.



JOHN A. HYMAN, MBA, CIMA

Chief Executive Officer, Algonquin Advisors

Mr. Hyman has over 30 years of experience in developing and leading sophisticated high net worth investment advisory businesses. Mr. Hyman is responsible for managing the company's day-to-day operations. Mr. Hyman is a member of the firm's Investment Committee and he chairs the firm's Compliance Committee.

Prior to joining Algonquin in 2010, Mr. Hyman was a Senior Managing Director for J.P. Morgan Securities and its predecessor firm Bear Stearns & Co., Inc. Prior to the merger of Bear Stearns and J.P. Morgan, he had the overall responsibility for the firm's investment advisory business. He served on J.P. Morgan's Global Wealth Management Investment Leadership Team and New Products Committee. He was a member of the Bear Stearns PCS Executive, New Products, Recruiting, Hiring, Risk, Ethics, Best Execution, Valuation and Proxy Committees. He chaired Bear Stearns Advisory Services Due Diligence, Research, Performance Measurement and Portfolio Manager Review Committees. Prior to joining Bear Stearns in 2003, he was a Managing Director at Oppenheimer & Co., Inc. where he led the firm's Asset Management Group. While at Oppenheimer he led the development of investment management programs in Canada through CIBC. Previously he worked in the investment management consulting groups at Smith Barney, Harris Upham & Co. and Drexel Burnham Lambert. Mr. Hyman is on the Board of Directors and is the Treasurer of the Guilford Foundation. He is a Member of the Legg Mason Client Solutions Advisory Council and the Franklin and Marshall College Leadership Council. Mr. Hyman formerly co-Chaired the Investment Committee for the Foundation for Jewish Culture and was a member of the organization's Board of Directors and Executive Committee. Mr. Hyman, a graduate of Franklin & Marshall College, received his MBA from the William & Mary. He is a Certified Investment Management Analyst (CIMA®) (for more information regarding the CIMA® certification, please visit <http://investmentsandwealth.org/home>) and a member of the Investments & Wealth Institute (formerly known as IMCA). He holds a FINRA Series 65 license and previous 24 and 63 licenses. John resides in New York City with his wife Merri.