NAAIM Workshop

Philadelphia-King of Prussia, 11-19-2015

Panel Bios

1) **Jason Wilder, Executive Vice President and Managing Director, Key Accounts**
   - **CMG Group, King of Prussia, PA**

Jason Wilder joined CMG Capital Management Group, Inc. in August 2000 and is the Executive Vice President & Managing Director of Key Accounts. Jason has held multiple positions during his tenure at CMG including Director of Operations, Vice President of Sales and National Sales Manager. Since 2012, Jason has served on the Board for The National Association of Active Investment Managers (NAAIM) and in 2014 became the President of the organization . Prior to joining CMG, he was an Assistant Limited Partnership Trader with the American Partnership Board. Before this, Jason was the Institutional Client Services Manager for Trust Company of America with responsibilities including omnibus trading, back office systems, sales integration, corporate action and advancing advisor relationships. Jason began his career in the financial services industry at Raymond James and Associates in Clearwater, Florida. In his position as Mutual Fund Reconciliation Specialist, he worked closely with mutual fund companies, transfer agents, wire houses and trust companies in both institutional and retail capacities.

Jason is a graduate of Eckerd College, St. Petersburg, Florida, with a Bachelors of Arts degree in Management and holds a FINRA Series 66 license

Jason lives in Berwyn, PA with his wife, Karen, and their two sons Zack and Jake. He is very active in his community as President of the Conestoga Generals Pop Warner Football organization and as a head coach. He also enjoys working as an assistant coach for the Devon Strafford Little League and the Conestoga Youth Lacrosse.

In his spare time, Jason enjoys backpacking/camping, losing all video games (except Madden 2016) to his sons, mountain biking and going to the movies.

2) **Paul Schatz, Founder and President**
   - **Heritage Capital, Woodbridge, CT**

Paul, has a wealth of experience trading equities, options and futures. While he is best known for his sector and index trading and models, his technical driven strategies have taken him into other asset classes as well. Paul is a recognized pioneer and expert in the exchange traded fund (ETF) field, having employed them in his work since 1994. Additionally, he has consulted for many of today's ETF purveyors on new product development and is a highly sought after speaker in the field.

While running Heritage Capital, Paul was also one of the portfolio managers for the TRI Liquid Strategies Fund LP from 2006 to 2008, where he ran Heritage's Sector, Diversified Growth, Global Asset Allocation, Developed Markets, Emerging Markets and High Yield Bond strategies.

Prior to founding Heritage Capital in 2003, Paul served as Chief Investment Officer for a regional firm from 1993 to 2002, specializing in equity model development and implementation. From 1991 to 1993, he worked at Cowen & Co., trading proprietary money in equities, options and futures. From 1989 to 1991, Paul was employed by Shearson Lehman Brothers in various financial planning and computer trading related positions.

Paul graduated from the University of Rochester in 1988 with a Bachelors Degree in Political Science and a minor in Economics.

3) Chuck Falco, President and Chief Investment Officer

– Limerick Financial Group, Limerick, PA

Chuck Falco is a well-known Financial Advisor and educator in Montgomery County who has been in the financial services industry for 31 years. In addition to many educational workshops and classes that he has conducted, he was the executive producer "Falco's Financial Strategies" that aired on PCTV for two years.

Chuck received his BA in Finance from Temple University, and received his Master's Degree from the Institute of Business and Finance. Chuck also has three Board Certifications by the Institute of Business and Finance, Certified by the National Social Security Advisors and has been named to the National Registries.

He is a current member of the International Association of Registered Financial Consultants, National Association of Active Investment Managers, the Spring-Ford, Phoenixville, and Tri-County Chamber of Commerce. He is the President and Chief Investment Officer of "Limerick Financial Group, LLC" ," Falco and Associates, Inc" and the founder and President of "Financial Education Network, LLC".

Chuck is also a past member of the Ed Slott "Elite IRA Advisors Group" as seen on PBS and the "H.S. Dent Economic and Demographic Advisory Group".