

*Verity's Investment Team brings an uncommon diversity of investment backgrounds and considerable depth of experience. Collectively, the members bring a great range of perspective in assessing markets, particularly during periods of uncertainty.*



**Gordon Wegwart**

President and Chief Investment Officer

Gordon co-founded Verity Asset Management and its parent company, Verity Financial Group, in 1996. As Chief Investment Officer, he developed the firm's proprietary tactical allocation and risk management strategies between 1998 and 2001 and has led the evolution and application of those strategies across multiple environments nationally, encompassing higher education, corporate retirement, and outside investment advisor networks. He has over 30 years of experience in strategic and tactical allocation across domestic, foreign, and emerging equity and debt; real estate; and commodities. He holds a BA from Duke University, where he graduated *summa cum laude* in 1976.



**Brian Kurtzer**

Senior Portfolio Manager

Brian joined Verity's Investment Team in late 2004 and assumed the role of Portfolio Manager in early 2006. Now the firm's Senior Portfolio Manager, he handles the management and trading responsibility for the firm's tactical allocation strategies on the Trust Company of America platform. Brian began his financial services career as a commodities broker and trader. He was a principle owner of TriCom Commodities, Inc., and was a member of the Coffee, Sugar, and Cocoa Exchange, followed by the New York Board of Trade, from 1983 to 2008. Brian served on the Board of Governors of the New York Board of Trade for multiple terms. He has a BS from the State University of NY at Albany and a JD from Fordham University School of Law.



**Brad Corbett**

Senior Portfolio Manager / Director of Fixed Income

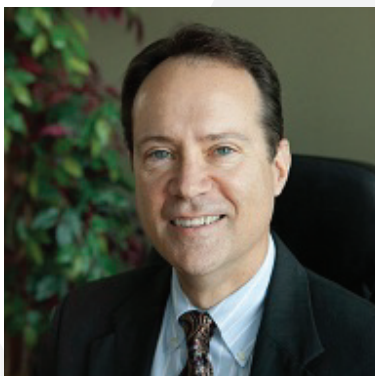
Brad joined Verity's Investment Team in June, 2014, after working as an independent consultant to the Chief Investment Officer of BlueCross BlueShield of North Carolina and officers of other select corporations on the management of strategic investments. He is portfolio manager for the firm's income strategies and has primary responsibility for institutional investing. He spent 11 years at Franklin Street Partners in Chapel Hill, NC, working at various times as Head of Global Investment Strategies and Portfolio Manager for the Opportunistic Fixed Income Fund. Brad was part of the team which developed and managed Franklin Street's Multi-Strategy Hedge Fund portfolio for the State of North Carolina Retirement System. His professional career began as a fixed income securities trader at Barclays Capital in New York. Brad holds an MBA from UNC's Kenan-Flagler Business School.



**Steve Lewis**

Portfolio Manager

Steve joined Verity's Investment Team in 2006. He launched the firm's Small/MidCap Value strategy in 2009 using a proprietary set of valuation metrics, and currently is Portfolio Manager for three U.S. equity strategies. Steve's background includes nine years at Dreyfus Management, Inc., where he spearheaded the development of the Dreyfus Managed Portfolio, a discretionarily managed mutual fund service. He was also a personal advisor to over two hundred institutions and high net worth families, with assets under advisement exceeding \$500,000,000. After leaving Dreyfus, Steve ran the Global Navigator hedge fund for two years before joining JPMorgan Chase as a Vice President of Investments.



**Malcolm Trevillian**

Portfolio Manager

Malcolm joined Verity's Investment Team in 2008 when his SEC-registered investment advisory firm, Chatham Advisors, LLC, became affiliated with Verity Asset Management. He was formerly a portfolio manager, analyst and board member of Franklin Street Partners in Chapel Hill and a senior portfolio manager at First Union Bank in Charlotte, where he managed institutional pension portfolios and one of the Evergreen mutual funds. He is a Chartered Financial Analyst and Chartered Market Technician and has served on the Board of Governors of the Chartered Financial Analyst Institute. Malcolm has a BA from Furman University.

## Field Advisory Group

*Supporting the Investment Team is a group of the firm's Advisors who have extensive experience listening to and serving investors. Each of these individuals has previously served on the firm's Investment Committee and brings a depth of insight to the discussion of strategies and the way in which they may be designed to better serve the firm's clients.*

### **Sean McGill** – Vice President and Director of Advisor Services

One of the founders of the firm and a member of the executive management team, Sean has extensive experience working with both individual clients and client advisors throughout the country. He is a central resource for investment advisors and advisory firms across the country who use Verity's investment management strategies with their clients. Sean served on the Investment Committee from 2005 to 2008.

### **Neal Huggins** – Financial Advisor

Neal joined Verity upon graduation from North Carolina State University in 1997. He was instrumental in the establishment of the firm's first branch location – in Wilmington, NC – and has led the expansion of the firm's business in eastern North Carolina as manager of that location since. He served on the Investment Committee from 2005 to 2014.

### **Pete Klas** – Financial Advisor

Pete joined Verity in early 2010, bringing over 10 years experience in investment consulting and financial planning. In addition to his work advising individual investors, he maintains primary responsibility for selection and monitoring of 401(k) investment options for the firm's Employer Plans division, along with related fiduciary responsibilities. Pete served on the Investment Committee from 2010 to 2014.

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