



## Karen L. McClintock, CFA, CIC

Managing Partner

Investment Experience: 30 years

Years with Firm: 24 years

As a managing partner and founding member of LSIA, Karen works closely with individuals and institutions to build custom portfolios. With experience as both a portfolio manager and analyst, Karen uses a multi-faceted approach to help identify her client's investment goals and determine their portfolio's optimal asset allocation. Karen is also a member of LSIA's fixed income team, where she helps establish the firm's positions in corporate and municipal bond securities.

Prior to starting LSIA, Karen managed investment portfolios as part of Portfolio Management Partners, a former division of Natixis Asset Management Advisors, LP (2006-2008) and Loomis, Sayles & Company, LP (1994-2006). Before joining Loomis Sayles, Karen worked for The Boston Company Asset Management, LLC (1992-1994), where she assumed both portfolio management and client service responsibilities. She also conducted valuation analysis of privately held firms at CAST Management Consultants (valuations manager, 1990-1992) and Deloitte (valuations manager, 1988-1990).

The same commitment and dedication that drives Karen's professional career also fuels her community activism. She is a member of and Investment Committee chair for the Order of the Holy Sepulchre and member of and Communication Committee chair for the Order of Malta. Karen served for over 10 years (including two years as President) on the board of Holy Family Adoption. She was also a past member of the Special Gifts Committee for the Cathedral of Our Lady of the Angels, a past member/chair for the Cardinal's Awards Dinner Committee and served as a judge for the Humanitas prize.

### EDUCATION AND ACCREDITATIONS

MBA - University of Southern California

BA - San Diego State University

Chartered Financial Analyst®

Chartered Investment Counselor

### PROFESSIONAL AFFILIATIONS

CFA Institute - Member

CFA Society of Los Angeles - Member

Years with Firm include tenure at LSIA; Portfolio Management Partners (formerly a division of Natixis Asset Management Advisors, LP; now Ostrum Asset Management); and Loomis, Sayles & Company, LP. Both Loomis, Sayles & Company, LP and Ostrum Asset Management are affiliates of Natixis Investment Managers.

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