

Credit Union Investment Strategy Group

TEAM MEMBER RESPONSIBILITIES



Mark B. Wickard
 Managing Director – Investments
 mark.wickard@opco.com
 (517) 333-7762

- Managing Director and Head of the Credit Union Investment Strategy Group of Oppenheimer & Co. Inc.
- Director of Product & Business Development
- Provides Economic & Market Commentary
- Portfolio Strategist



Tobias E. Timm
 Director – Investments
 tobias.timm@opco.com
 (517) 333-7763

- Portfolio Evaluation, Fixed Income & Credit Analysis
- Strategy & Trade Execution
- Product Origination/Trading Desk Liaison (Internal and External)



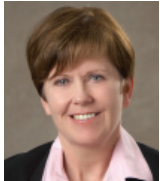
Regina Wickard
 Director – Investments
 regina.wickard@opco.com
 (517) 333-7760

- Director of Business Development
- Director of Operations for Team & Clients – Lines of Credit, Due Diligence, etc.
- Regulatory Oversight including Investment Policy Statements
- Client and Prospect Development



Kevin T. Lynch
 Director – Investments
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- Oversees the Technical Aspect of all Analytics
- Bond Accounting Inquiries
- Develop & Implement Pre / Post Purchase Fixed Income & Credit Analysis, Strategy & Trade Execution



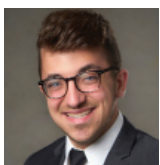
Elizabeth L. Duncan
 Group Analytical Associate – Director
 elizabeth.duncan@opco.com
 (517) 333-7764

- Responsible for Customized Client Reports
- Valuation and Risk Analytics
- Regulatory Mandated Reporting and Analytics – \$703 Quarterly Report, Monthly Pricing, HTR (Historic Total Return), Credit Surveillance
- Pre-Analysis Portfolio Preparatory Work



Bryan L. Bell
 Group Business Associate
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- Account Management & Administration
- Asset Movement – Principal & Interest & Payments / Settlements
- Prospect, Marketing & New Client Acquisition
- Coordinating Client and Prospect Calls
- Client Support / Legal Documentation / Asset Protection



Isaiah J. Timm
 Financial Advisor
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- Portfolio Management
- Risk Management Strategies
- Asset Preservation and Growth
- Coordinate work with Directors



Seth A. Kellicut
 Group Marketing Associate
 seth.kellicut@opco.com
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- New Business Development
- Relationship and Account Management
- Event Coordination
- Marketing and Educational Materials

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