

**Scott Middleton, CFA, CIMA[®], Principal, Director -- Investment Committee
Innovest Portfolio Solutions**

Scott is a principal and senior consultant for Innovest Portfolio Solutions, as well as director of its investment committee. Innovest is an independent provider of investment related consulting services for high-net-worth families, non-profit organizations and retirement plans. Innovest manages approximately \$3.5 billion in investable assets for its clients.

As director of Innovest's investment committee, Scott's responsibilities encompass capital markets expectations, investment strategies and investment philosophy. He is a member of the firm's leadership team, which sets Innovest business and client policies and also a member of Innovest's Capital Markets Research group. He has over 20 years of experience in investment management, focusing on customized portfolio management and consulting for high-net-worth families with complex estate plans, and for institutional clients.

Scott holds the CFA (Chartered Financial Analyst) and CIMA[®] (Certified Investment Management Analyst) designations from the CFA Institute and the Investment Management Consultants Association, respectively. Scott is a member of the Investment Management Consultants Association, the CFA Institute, and the CFA Society of Colorado. He is also a former grader for the level-three CFA examinations.