



Peter D. D'Agati, CFA

Peter D'Agati – Stembrook Asset Management

Mr. D'Agati is Founder and President of Stembrook Asset Management, and is actively involved in all investment and research activities of the firm.

Prior to founding Stembrook Asset Management, Mr. D'Agati was founder and Head of Portfolio Strategy Research at Brown Brothers Harriman, the oldest and largest private bank in the United States. In this role, he was responsible for developing the high-level investment strategies used in the management of portfolios for high-net-worth individuals, endowments, foundations, trusts, and institutional clients – representing \$45 billion of investment assets. Investment strategies included a broad range of traditional and alternative asset classes, and incorporated tax planning, risk management and liquidity considerations. Mr. D'Agati served as Chairman of the Investment Committee responsible for selecting investments for inclusion in client portfolios and served on the Alternative Assets Investment Policy Committee. Mr. D'Agati also co-founded Brown Brothers Harriman's Tax-Efficient Risk Management practice, and was the senior researcher in charge of portfolio risk management and tax-efficient asset management for private clients. Previously, Mr. D'Agati spent four years with Lazard Asset Management where he developed a variety of sophisticated tools designed to measure, manage and evaluate client portfolios across countries and currencies.

Mr. D'Agati earned his Bachelor of Science in Mathematics and Finance from Providence College. He is a holder of the Chartered Financial Analyst designation and is a member of both the CFA Institute and the New York Society of Securities Analysts. Mr. D'Agati has been an invited speaker at numerous investor forums including the Institute for Private Investors and Columbia Business School.

Mr. D'Agati founded and continues to lead a discussion group focused on exploring innovative solutions to global challenges. He is an active member of his community, sitting on the Board of the Historic Paulus Hook Association for community preservation and development. He also volunteers his time with the Pratt Design Incubator, which assists entrepreneurs in the process of turning innovative ideas into successful businesses. Mr. D'Agati is an avid sailor and regularly competes in local regattas.