

SOUTH TEXAS MONEY MANAGEMENT, LTD.

Jeanie Wyatt, CFA

CEO & Chief Investment Officer | South Texas Money Management, Ltd.



Jeanie Wyatt, CFA founded South Texas Money Management in December 2000. Ms Wyatt was named Top 100 Independent Advisors in Barron's Magazine (August 2011 and August 2010) and Top 50 Women in Wealth in Wealth Manager Magazine (April 2008). She has led the firm's growth from 3 to approximately 60 employees and approximately \$2 billion in assets under management (as of March 31, 2012). The firm has been named on multiple occasions as one of the 'Top Guns' by Informa Investment Solutions (IIS) under IIS Plan Sponsor Network (PSN) database in the peer group for Domestic All-Cap Core Equity Managers. Based in San Antonio, TX, South Texas Money Management has additional offices in Austin, Houston, and Dallas.

Prior to founding STMM, Ms. Wyatt was Executive Vice President and head of Frost Investment Services (Cullen/Frost Bankers, Inc.). She was responsible for the investment areas of nine trust departments around the state with approximately \$13 billion in assets. She also managed the Trust Department's largest commingled equity fund for 15 years. Her total trust-banking career spanned 27 years with three bank holding companies around the state. A Chartered Financial Analyst, she holds an honors degree in Actuarial Science from the University of Texas at Austin and an MBA from the University of Texas at San Antonio.

Ms. Wyatt is past chairman of the CFA Institute's Public Awareness Committee and served on the Board of Governors of the CFA Institute, an international organization of over 100,000 investment professionals. Ms. Wyatt has been a special guest on Wall Street Week with Louis Rukeyser and is currently a quarterly guest on Wallstreetweek.com. She has been interviewed by financial media, including the New York Times, Wall Street Journal, Financial Advisor Magazine, CNN, Fox Business news, AP newswire, and Thestreet.com.

Ms. Wyatt has served on the State Pension Review Board, the state's nine member mechanism for limited oversight of public retirement systems in Texas. She has also served on the National Endowment Fund Board of Trustees of the American Red Cross. The Endowment Fund was established in 1910 to provide a permanent source of support for Red Cross activities and services. In addition, Jeanie Wyatt has served on the Pension Plan Board of Trustees of the University Health System in San Antonio and is currently a trustee of the Southwest Research Institute. In 2007, Ms. Wyatt was a recipient of the Distinguished Alumni Award from UTSA, the Planned Giving Allied Professional of the Year Award from the Planned Giving Council of San Antonio and the Women's Leadership Award for Business Growth by the San Antonio Business Journal. She was elected "San Antonio's Entrepreneur of the Year '03" by the Women's Chamber of Commerce, is a Texas Business Hall of Fame honoree and served on the Texas Business Hall of Fame Board of Trustees. Additionally, Ms. Wyatt served on the UTSA College of Business Advisory Council. She currently serves on the Corporate Council for the Long Center for the Performing Arts and the Lady Bird Johnson Wildflower Center Board. She is also a member of Texas Women for the Arts.

Ms. Wyatt was a regular columnist about investing for the San Antonio Express-News, which has the largest daily newspaper circulation in South Texas. An Austin native, she and her husband, Bill, enjoy the outdoors and their seven grandchildren.