

PORTFOLIO MANAGEMENT TEAM

WILLIAM C. MILLER, IV

Principal & Portfolio Manager

Bill holds a B.A. degree from Williams College and an M.B.A. from Harvard Business School. Mr. Miller has established an outstanding record during his 35-year career as an investment manager. Mr. Miller began his investment career at J.P. Morgan. Later, he joined Eberstadt Asset Management as a senior portfolio manager, where he managed over one billion dollars of pension and private accounts. Mr. Miller joined the firm in 1984 and serves as one of the firm's principal portfolio managers.

JORDAN S. PRESS

Principal & Portfolio Manager

Jordan holds a dual M.B.A. from Columbia Business School & the London Business School. He graduated from Vanderbilt University in 1995 with a B.A. in Political Science and French. Jordan joined J.M. Hartwell in 1998. He is lead portfolio manager of the Hartwell Concentrated Growth Portfolio LP. Prior to joining Hartwell he worked for La Salle Bank N.A. . He is a principal and stockholder and functions as one of the firm's primary portfolio managers.

WILLIAM D. JONES

Principal & Portfolio Manager

Bill holds an M.B.A. degree from Northwestern and a B.A. in economics from Bucknell University. Bill has established an outstanding performance record during his 35-year career as an analyst and investment manager. Bill holds a Certified Financial Analyst designation. Bill began his investment career at Equitable. Later, he joined Alliance Capital, where he managed pension and private accounts. Bill joined the firm in 2002 and serves as one of the firm's principal portfolio managers.

KEVIN P. KELLY

Principal & Portfolio Manager

Kevin holds an M.B.A. degree with concentration in finance from the University of Connecticut and a B.A. degree in Political Science from Syracuse University. Kevin worked as an analyst for American Capital Access specializing in fixed income and corporate bond research in New York. Kevin has also served as an investment advisor with Morgan Stanley Dean Witter in San Jose and as a trader at Charles Schwab in Denver. Kevin joined J.M. Hartwell in 2004 and became a Principal in July 2007. He serves as one of the firm's principal portfolio managers.