

## Paul Danes, CFA

**Consultant, Stratos Wealth Partners** – managing tactical asset allocation portfolios for advisors and clients.

### **Former Chief Investment Officer and Senior Portfolio Manager – Victory Diversified Equity**

- BS from Arizona State University – 1983. Finance major
- MBA from The Ohio State University – 1987
- Chartered Financial Analyst – 1990
- Equity Research Analyst – 1987-1993
- Portfolio Manager – 1993 to 2017; roles included co-manager of a U.S. Midcap Value Fund, Senior Portfolio Manager of same U.S. Midcap Value fund, co-manager of a U.S. Large Cap Blend Fund, CIO of same U.S. Large Cap Blend Fund.

Paul Danes was the co-Chief Investment Officer and senior portfolio manager of Diversified Equity Management's Diversified Equity strategy. He was a member of the portfolio management team for the Victory Diversified Equity strategy, a large-company, domestic equity strategy/fund. At its peak, this team managed over \$13 billion in mutual funds as well as individual portfolios for corporations, endowments and foundations and nonprofit institutions. He graduated from Arizona State University with a Bachelor's degree in Finance, and received his MBA from The Ohio State University in 1987. He has 30 years of investment experience, including 27 with Victory Capital Management or its predecessors where he has been both an equity securities analyst, portfolio manager, and Chief Investment Officer. As the CIO, Paul reviewed investment performance and portfolio strategy to the following clients as all as all consultants – Mercer, Cambridge Associates, etc.

### ***Representative Clients***

- Abu Dhabi Investment Authority (Sovereign Wealth Fund)
- Alaska Police and Fire (Taft-Hartley)
- BMW Corporation (Pension/401K)
- Brunei Investment Authority (Sovereign Wealth Fund)
- Cleveland Clinic Foundation (Endowment)
- Charles Schwab (401k platform)
- Chevron Corporation (Pension)
- Fidelity (401k platform)
- Houston Firefighters (Taft-Hartley)
- Bank of America Merrill Lynch (401k platform)
- Morgan Stanley (401k platform)
- Ohio Operating Engineers (Taft-Hartley)

- Salt River Pima Tribe (Endowment)
- Sherwin-Williams Corporation (Pension/401K)
- University of California Regents (Endowment)
- University of Montreal (Endowment)

Personal Information:

- Cleveland Heights resident since 1990.
- 2 graduate children from HB – Claire (2014), Madeleine (2016). Claire is a senior at the University Of Notre Dame and Madeleine is a sophomore at the University of Michigan.
- Spouse – Julie Tebo, Director of Problem-Based Learning at the Lerner School of Medicine, Cleveland Clinic.