

Neil F. Campbell, Jr.

A Road through the Woods

Throughout his career, Neil Campbell applied his education in economics and his zeal for innovative thinking to help companies and individuals augment their business and financial productivity. A proudly provocative person, Neil enjoys being a catalyst in forging new ways for clients to consider their financial lives.



The fine print reminding investors that past performance does not indicate that of the future applies to Neil's unorthodox curriculum vitae. Rather than a laundry list of jobs, Neil has accrued a compendium of wisdom enabling him to provide productive and viable options for families in the management of their financial lives. Just as in portfolio management, life's past successes (or failures) do not dictate the future. What matters is how nimbly you discern what the future needs.

Neil began his career with Nestlé-Beringer Winery after graduating from UC Berkeley in 1972. One of the key members of Beringer's "change agent" team, Neil implemented the firm's focus on market share of profit to reorient distribution channels away from a traditional sales-volume and market-share paradigm. After establishing markets and opening new territories for Beringer, Neil started his own import company and was one of the first to introduce New Zealand wine to the United States.

With the sale of the wine company in 1986, Neil was recruited by Campbell Reed Conner & Birdwell, a portfolio management firm founded by his father in 1959. Campbell Reed prospered from incorporating Neil's thought leadership about redeveloping distribution channels, refining the investment philosophy, and analyzing client profiles. Neil's analysis revealed that a significant portion of Campbell Reed's clientele was second and third generation, and that another was charitable trusts.

In 1987 Neil established a relationship with Canterbury Capital. Soon thereafter he watched the Quotron machine as the market melted down by one-third on October 19. It was an extraordinary time to be managing portfolios, particularly under the tutelage of his father. By focusing on profits, Neil uncovered viable options for perspective clients. Canterbury CEO Bob Cluck posed a question to Neil around this time about the limitations a brokerage faces in adding value to the wealth management relationship. It sparked years of deep thinking that culminated two decades later in the launch of FUTR Family Management, LLC.

FUTR also evolved out of Neil's growing understanding of how family culture and family investment risk interact. He observed the benefit to families of thinking transgenerationally and behaving as institutions. These principles became incorporated in the investment due diligence Canterbury performed for Neil's own family. Coming full circle, Canterbury now acts as FUTR's team member,

overseeing FUTR's sub-advisor selection, providing families access to the best that they would otherwise lack.

In the early to mid-1990s Neil launched a consulting practice in which he unified his skills in organizational development with his investment discipline to help companies gain advantage. The goal was to analyze and understand the impact of employees on the income statement and balance sheet. Neil's client roster included Hughes Aerospace, Mondavi Winery, Terry Lumber, Connecticut Mutual's Ford-Meehan Agency and American National Can, plus others. This diverse group shared in common the rich capability and experience of their employees. The companies that prospered best were those most focused on developing the wealth of all stakeholders.

In 1998, Neil was recruited to UBS / PaineWebber where he was first introduced to the open-architecture trust services of Comerica Bank & Trust. Neil and his UBS partners formed the team Neil initiated with several partners, Family Investment Management Group LLC, remained at UBS until 2003. After moving to LPL Financial, Neil concluded that an NASD brokerage would never sufficiently address the specialized wealth management needs of families. In 2008 he turned his full attention to FUTR as the vehicle to provide successful family office services. Neil has been a member of the CFA Institute since 1987 and the Investment Management Consultants Association (IMCA) since 2002. He received his Accredited Investment Fiduciary (AIF) designation in 2008. Neil is also recognized as a Paul Harris Fellow from Rotary International.

A fervent practitioner of Abraham Lincoln's model of continuing self-education, Neil's passion for lifetime learning unleashes the potential and kinetic energy for the benefit of FUTR clients. Neil has one son Benjamin, 25, whose interest in philosophy, strategy and profitable ideas bring him great joy. Conversations with Ben are the source of many shared profundities with clients and friends. Neil is an avid golfer, a beginner fly fisherman, and an IFR-rated pilot.

"If you are resolutely determined to make a lawyer of yourself, the thing is more than half done already. It is but a small matter whether you read with anybody or not. I did not read with anyone. Get the books, and read and study them till you understand them in their principal features; and that is the main thing. It is of no consequence to be in a large town while you are reading. I read at New Salem (IL), which never had three hundred people living in it. The books, and your capacity for understanding them, are just the same in all places."

~ Letter from Abraham Lincoln to Isham Reavis
November 5, 1855