



FUTR Board of Governors

The management of FUTR Family Management firmly believes that it is important to constantly seek ways to improve the company. By adapting this attitude, the firm will be able to offer its clients best-of-breed investment management services on an on-going basis. To this end, FUTR has formed a Board of Governors comprised of a diverse group of successful business people and entrepreneurs from a variety of industries.

The Board of Governors provides FUTR feedback on all aspect of its business – from its finances to its investment offerings to its marketing plan. The Board of Governors also provides proactive advice on issues and in areas that they feel impact FUTR and its clients. With their advice, they bring many years of experience and first-hand knowledge of how successful enterprises operate. The Governors are not paid for their service, eliminating any potential conflicts of interest.

The Board of Governors meets with FUTR and its strategic partners on a bi-annual basis, and holds quarterly conference calls with FUTR management. Members are appointed for two-year terms.

The current members of the FUTR Board of Governors are:

David B. Baker, CPA, CVA

David Baker is a partner at Moore & Baker LLP, where he specializes in Litigation Support, Expert Testimony, Business Valuations and Individual Taxation and Planning. He gained his initial accounting experience at the worldwide firm of Peat, Marwick, Mitchell and Company, and joined with Richard Moore in 1982 to found Moore & Baker, LLP.



David is a graduate of Stanford University, and he received his MBA from the University of Southern California. He is a Certified Valuation Analyst, having received his CVA from the National Association of Certified Valuation Analysts.

He previously served on the Board of Directors and as the Chairman of the Audit Committee for EurekaBank, a publicly traded Savings and Loan in San Francisco, until



its sale to Bay View Bank in 1997. David has been and continues to be involved in numerous charitable activities, having served as President of the Diablo Regional Arts Association, and the Mt. Diablo Chapter of the YMCA. He annually hosts the Cal Bullpen Golf Tournament to raise money for the baseball program at the University of California. He is an avid golfer and has traveled the world in pursuit of this passion.

David lives in Walnut Creek, California with his wife Stephanie. They have three grown children, the eldest being John Baker, a major league baseball player for the Florida Marlins.

Terence M. Green

Terry Green is the President and Chief Development Officer for the Palomar Pomerado Health Foundation (PPHF) in Escondido, CA. He has more than 35 years experience in the non-profit field. Terry joined PPHF in 2009 after a 12-year tenure with Children's Hospital Los Angeles where he served as Vice President of Development.

Prior to his job in Los Angeles, Terry worked for three years as the Director of Development for the Catholic Diocese of San Diego; he has held other fund raising positions in education and healthcare throughout his career and was president of a fund raising consulting firm prior to his move to California in 1993. Terry is a frequent speaker at regional and national fund raising conferences.



Terry earned his Bachelor of Arts and Masters Degree from Aquinas College in Grand Rapids, Michigan. He is a member of the Country Club of Rancho Bernardo, the Century Club of San Diego, the Grace DeDeiu Foundation and the Rancho Bernardo Rotary Club. He is also a member of the Association of Fundraising Professionals and the Association of Healthcare Professionals and a director of the Rancho Bernardo Business Association.

Terry lives in Carlsbad, CA with his wife, Mary Lou. They have three grown children.



Robert Olsman

Bob Olsman has more than 40 years of experience in the property casualty industry as an underwriter, senior executive, and consultant. Since 2006 joined a team to form Intrepid Risk Services, a wholesale insurance broker that markets a Lloyd's of London underwritten product designed to insure commercial property owners against damage from Terrorism attacks. He also continues to run the consulting firm which he formed in 2000. His focus in his practice has been on M+A, new products, creating underwriting platforms, and organizational development.



For the majority of his career he worked for the Travelers in all aspects of commercial underwriting, operations and field management. In 1986 he joined Reliance Insurance in Philadelphia as Senior Vice President and in 1995 became President of Reliance's Middle Market Company.

In 2000 he formed his own consulting company where he has worked with MGA's and brokers. His focus

In addition to his professional work, he has been active in community and not for profit activities, including the Boards of Moss Rehabilitation Hospital and The Albert Einstein Health Network.

Bob lives in Philadelphia with his wife Cindi and their daughter Alexandra. Cindi is a physiologist and artist and Alexandra is a student at the University of Pennsylvania.

Jack McAboy

Jack McAboy is the Founder of Bay Area Educational Support Services, the largest operator of Sylvan Learning Centers in the world. Prior to founding the company in 1995, he was a strategic consultant and taught The Dale Carnegie Management Seminar and The Strategic Assessment Workshop for Eddie C. Snow and Associates. Previously, he was Chairman of the Board of the California Electric Service. He also has more than 20 years of experience in the security alarm and medical devices businesses.



Jack graduated from The Army and Navy Academy in Carlsbad, CA. He holds a Bachelors Degree in Marketing from San Francisco State University and an MBA from



Golden State University. Jack's past and current board memberships include: Redwood Day School, Warrack Medical Center Hospital, Third Age Foundation, Orinda Parks and Recreation Foundation and Champions for Humanity Steering Committee. He also spearheaded the development of H.O.P.E. (Help Oakland Pupils Excel), a scholarship/mentoring program that has helped more than 80 at-risk youths in Oakland.

Jack and his wife Carole Doran have two children and one grandchild. He enjoys sports and traveling with his wife throughout the world.

Tom McKee

Tom McKee is the CEO, Family Business Manager and co-owner of The Ken Blanchard Companies. He has been with the company since 1987, and has previously held the positions of CFO, General Manager, Vice President and Chief Operating Officer. Prior to joining The Ken Blanchard Companies, Tom worked in the restaurant and food industry for 12 years. He was in management with The Rusty Pelican Corporation and an account executive with Lady Baltimore Foods in Kansas City.



Tom earned his Bachelor of Arts degree in Environmental Conservation from the University of Colorado in Boulder, Colorado. He helped found the Masters of Science in Executive Leadership (MSEL) Program at The University of San Diego and the Ken Blanchard College of Business at Grand Canyon University in Phoenix, Arizona. Tom's other Board Member participation has been with The Better Business Bureau, The Private Industry Council and Workforce Partnership, The Golf University of San Diego and The Instructional Systems Association (ISA).

Tom and his wife Jill have two children: Casey born in 1998 and Julie born in 1995. Tom is an avid golfer and the whole family loves Snowboarding and Skiing as well as summer water and boating activities.