

## CTC | myCFO Welcomes New Chief Investment Strategist

**PORTLAND, November 10, 2016** - CTC | myCFO announced today that **Yung-Yu Ma, Ph.D.** is joining the firm as Chief Investment Strategist, beginning on November 14, 2016.

Yung is an award-winning instructor\* and Assistant Professor of Finance at Lehigh University, most recently teaching courses on Fixed Income, Equities and Derivatives. His published papers have addressed topics ranging from the effects of computerized trading on the liquid markets to analysis of the outcomes of bankruptcy and restructuring of U.S. corporations.

Yung will collaborate in various investment-related activities and working groups at CTC | myCFO. In addition to directing discussions of macro-economic trends and assessing our strategic and tactical views, Yung will be instrumental in determining our asset allocation inputs and guiding the modeling of client portfolios. He will be a frequent contributor to our firm's published thought leadership and will enjoy extensive interaction with our ultra-affluent clients. He will be located in our Portland office, reporting to John V. Banker, Managing Director and Head of Research.

"I am extremely pleased Yung will be joining our investment research team," said John Banker. "His background combines a distinguished academic career with real world business experience in the United States and Asia. This dynamic combination will enrich our analysis of macro-economic trends and will provide strong leadership to our work making strategic assessments of markets. I was also impressed by the high marks Yung's own students gave him while at the Lehigh University. He will be a powerful contributor to our work and a great addition to our team."

Yung earned his Ph.D. in Finance at the University of Utah and his B.A. in Economics and Political Science, *magna cum laude*, at Williams College. Prior to his academic career, Yung worked for consulting firm Accenture, performing financial and market analysis for global companies with operations in Taipei and Hong Kong. Later, he oversaw the operations at a Fortune 500 subsidiary in Taipei and Mainland China. The Illinois native speaks fluent Mandarin Chinese. He is also a basketball fan and a volunteer coach.

## About CTC | myCFO

CTC | myCFO is a high touch, high service wealth consulting firm that delivers integrated solutions to ultra-affluent individuals, families and family offices. We offer a comprehensive suite of multi-family office services and expertise, including Investment Advisory, Family Office, Capital Advisory and Fiduciary Advisory Services. Supported by the resources of our parent company, BMO Financial Group, CTC | myCFO uniquely offers an independent, advocacy-based platform from which to serve our clients, enabling our advisors to deliver solutions without being captive to any particular product or vendor. Vigilant advocacy, objectivity, transparency, collaboration and performance are our governing principles.

We trace our roots to two premier wealth management firms, CTC Consulting and Harris myCFO, which combined in 2012 to form the integrated wealth management firm we are today. We serve over 300 client relationships, with \$36 billion in assets under management or advisement and \$46 billion in assets under custody and administration as of June 30, 2016. Our firm has 12 offices around the country and employs over 175 multidisciplinary professionals, including investment consulting and advisory professionals as well as family office, capital advisory and fiduciary professionals.

Additional information can be found online at [www.ctcmfco.com](http://www.ctcmfco.com) or please call us 503.228.4300.

\*Yung-Yu Ma won the **Staub Outstanding Teaching Award** at the Lehigh University College of Business in 2014. This honor is awarded each year to one faculty member from an 80+ person faculty and is voted on by a panel of faculty and students.

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