

For Immediate Release

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Michael Clinton Joins Loring Ward as New COO and CFO

San Jose, CA – Loring Ward International Ltd. (“Loring Ward” or the “Company”) announced that Michael Clinton has joined the firm as the new Chief Operating Officer and Chief Financial Officer.

Mike has twenty years of experience in the investment and public accounting industries, including fourteen years as a senior financial and operational executive and six years as a CPA for a San Jose company.

For the last five years, Mike was the Vice President of Fund Administration of Charles Schwab Investment Management, where he was responsible for the daily oversight and administration of a number of proprietary fund complexes.

From 1995 – 2004 Mike held various positions at Loring Ward’s predecessor firms, including Executive Vice President, Chief Operating Officer and Chief Financial Officer. Additionally, Mike was the Chief Accounting Officer and Treasurer of the SA Funds from launch in 1999 through 2004.

“We’re delighted to have Mike back at Loring Ward,” said Alex Potts, President and Chief Executive Officer of Loring Ward. “His experience and deep knowledge of our business will be an enormous asset as we continue to expand our turnkey portfolio management services.”

Mr. Clinton earned a Bachelor of Science in Accounting at San Jose State, is a Certified Public Accountant and is a Financial Operations Principal (FINRA Series 27 license).

Nicole Newlin, who has served for the last three years as Loring Ward’s COO, will now become the new Chief Administrative Officer, focusing on helping the Company run more effectively and efficiently, with a special focus on planning, organizing and managing resources to drive major firm initiatives.

According to Alex Potts, “Nicole played a crucial role in our past achievements, and she will be even more critical to ensuring our future success.”

About Loring Ward

Loring Ward International is headquartered in San Jose, CA. Its subsidiary, Loring Ward Financial Inc. provides a turnkey asset management program to some of America’s most knowledgeable and successful investment advisors and their clients. These services include investment strategies and products, back office operational processing, education and training, and business development support. Loring Ward International is a wholly-owned subsidiary of Werba Reinhard, Inc. For more information, please visit www.loringward.com.
