Dolan McEniry Core

August 31, 2026

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Dolan McEniry

About Dolan McEniry

- Value investor in U.S. corporate bonds
- Credit analysis is our core strength and research is conducted in-house
- Contrarians who emphasize free cash flow credit analysis
- Driven to uncover hidden value (quality credits at attractive prices)
- Based in Chicago and founded in 1997
- $14.4 billion under management as of August 31, 2026
- Family of five products

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Assets Under Management

Data through August 31, 2026

Total Assets Under Management

$14,367 Million

Total High Yield Assets Under Management

$3,284 Million

Total Investment Grade Assets Under Management

$11,083 Million

*As of May 31, 2025, the Dolan McEniry Investment Grade Composite was renamed the Dolan McEniry Core Composite.

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Dolan McEniry Core Performance

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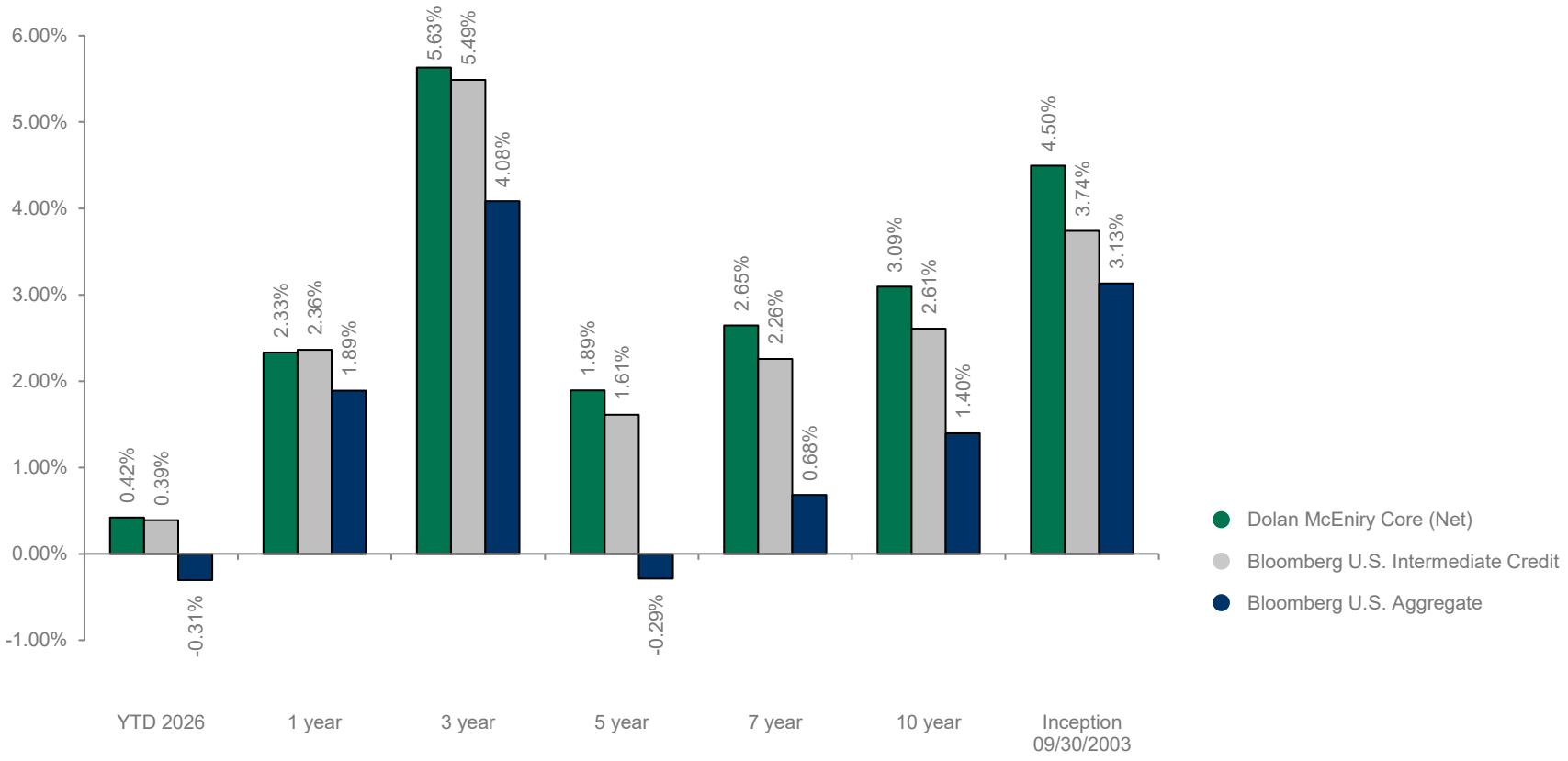
Returns

Dolan McEniry Core

Data through August 31, 2026



Please reference GIPS Report in the appendix. Returns for periods exceeding 12 months are annualized. Past performance is no guarantee of future results.
*As of May 31, 2025, the Dolan McEniry Investment Grade Composite was renamed the Dolan McEniry Core Composite.

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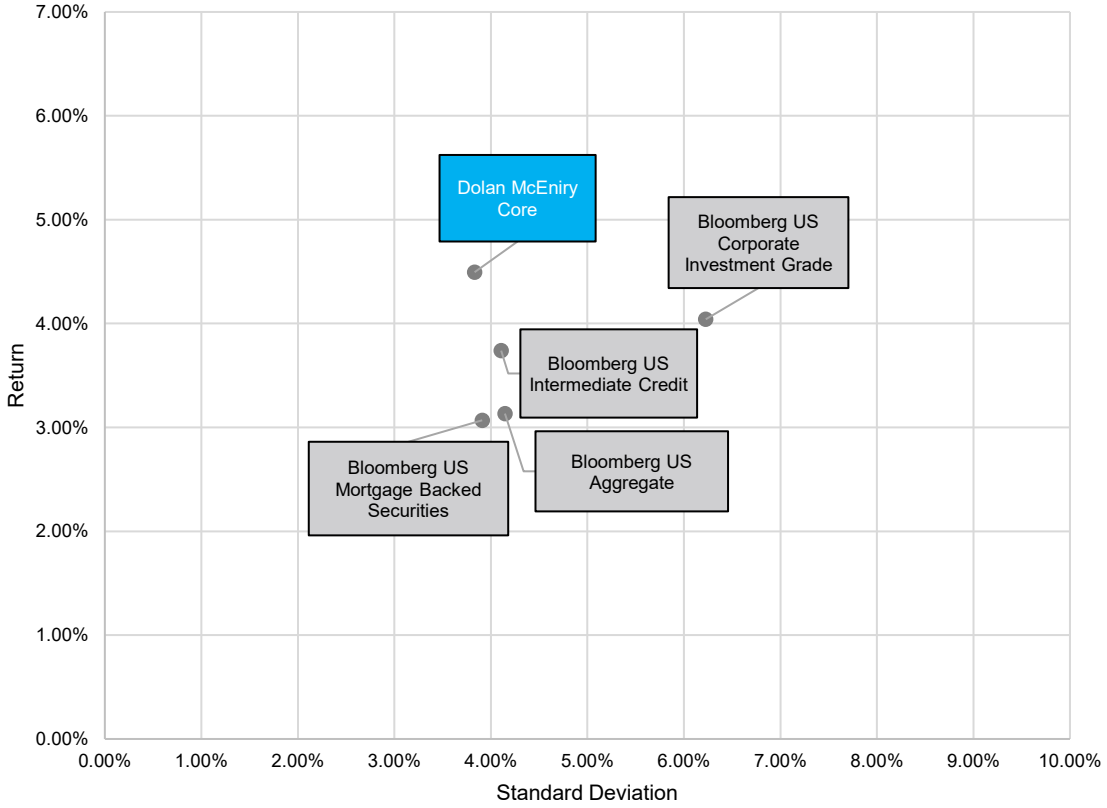
Dolan McEniry

Risk Adjusted Returns

Dolan McEniry Core Sharpe Ratio Performance Versus Key Benchmarks

Data September 30, 2003 through August 31, 2026



- Dolan McEniry Core has high risk adjusted returns versus US Fixed Income Indexes
- Dolan McEniry Core performs well versus US Fixed Income Indexes with a low standard deviation

	Standard Deviation	Return
Dolan McEniry Core	3.83%	4.49%
Bloomberg US Aggregate	4.15%	3.13%
Bloomberg US Corporate Investment Grade	6.23%	4.04%
Bloomberg US Intermediate Credit	4.11%	3.74%
Bloomberg US Mortgage Backed Securities	3.91%	3.07%

As of May 31,2025, the Dolan McEniry Investment Grade Composite was renamed the Dolan McEniry Core Composite. Dolan McEniry Core inception date is 09/30/2003. This data is being presented as supplemental information to the GIPS Report located in the appendix. Returns for periods exceeding 12 months are annualized. Past performance is no guarantee of future results. Cash allocation is not included in the performance returns and this could impact returns. The data above is net of fees. The statistics do not reflect a representation of any one client's experience. eVestment Alliance (eA) is an innovative, web-based provider of comprehensive investment information and analytic technology. eVestment Alliance collects information directly from investment management firms and other sources believed to be reliable. The above results, as reported by eVestment Alliance as of 08/31/2026. Sharpe Ratio is a highly accepted measure for calculating risk-adjusted return and calculates the average return earned in excess of the risk-free rate per unit of volatility or total risk. A manager taking on risk, instead of investing in cash, is expected to generate higher returns and Sharpe measures how well the manager generated returns with that risk. It is a measurement of efficiency utilizing the relationship between annualized risk-free return and annualized standard deviation. The higher the Sharpe Ratio, the greater efficiency produced by the manager. Standard Deviation is defined as a measure of the average deviations of a return series from its mean; often used as a risk measure. A large standard deviation implies that there have been large swings or volatility in the manager's return series.

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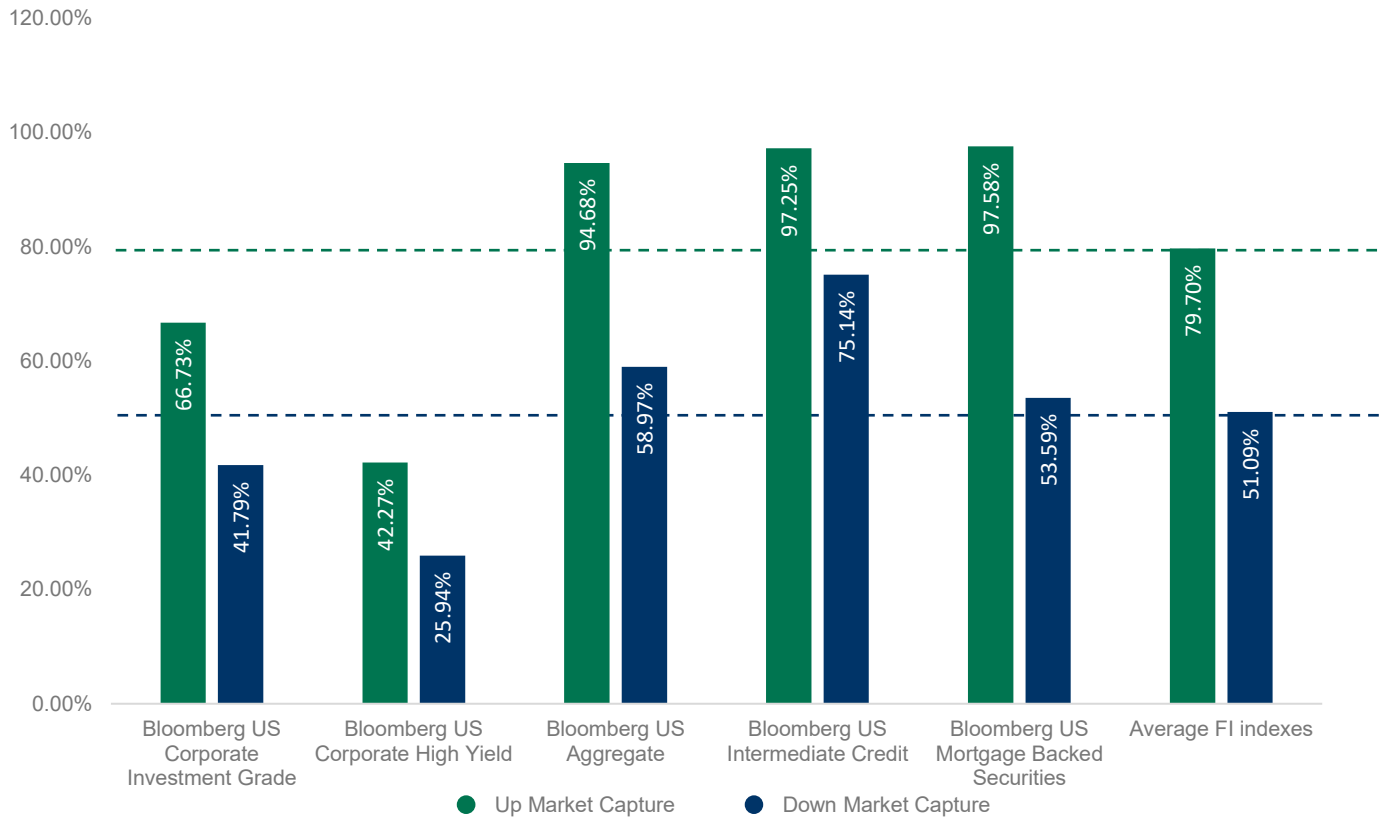
Upside Downside Capture

Dolan McEniry Core Upside Downside Capture relative to Benchmarks

Data September 30, 2003 through August 31, 2026



To IG 67%

To HY 42%

Average Upside Capture*: 80%

Average Downside Capture*: 51%

To IG 42%

To HY 26%

As of May 31, 2025, the Dolan McEniry Investment Grade Composite was renamed the Dolan McEniry Core Composite. Dolan McEniry Core inception date is 09/30/2003. eVestment Alliance (eA) is an innovative, web-based provider of comprehensive investment information and analytic technology. eVestment Alliance collects information directly from investment management firms and other sources believed to be reliable. The above results, as reported by eVestment Alliance as of 08/31/2026. Upside Capture is a measure of the manager's performance in up markets relative to the market itself. A value of 110 suggests the manager performs ten percent better than the market when the market is up during the selected time period. The return for the market for each quarter is considered an up market if it is greater than or equal to zero. Downside Capture is a measure of the manager's performance in down markets relative to the market itself. A value of 90 suggests the manager's loss is only nine tenths of the market's loss during the selected time period. A market is considered down if the return for the benchmark is less than zero.
*The average downside and upside capture presented is relative to the above benchmarks. Past performance is no guarantee of future results. The data above is net of fees. The statistics do not reflect a representation of any one client's experience. This data is being presented as supplemental information to the full GIPS Report located in the appendix.

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Our Strategy and Process

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Investment Strategy and Process

Fixed income value investors

Quality credits

Wide spreads

Credit analysis is our core strength

Free cash flow based

Wide margins of safety

In-house research/ideas

No Wall Street reports

No reliance on rating agencies

Vigilant about our circle of competence

Consumer, industrial, service, low tech

No banks or broker dealers

Lender's approach to fixed income markets

Long-term lending vs. short-term trading

Intermediate duration manager

Average duration of 4 years

No speculation on interest rates

Concentrated portfolios of 40-45 issuers

Not a proxy for any benchmark

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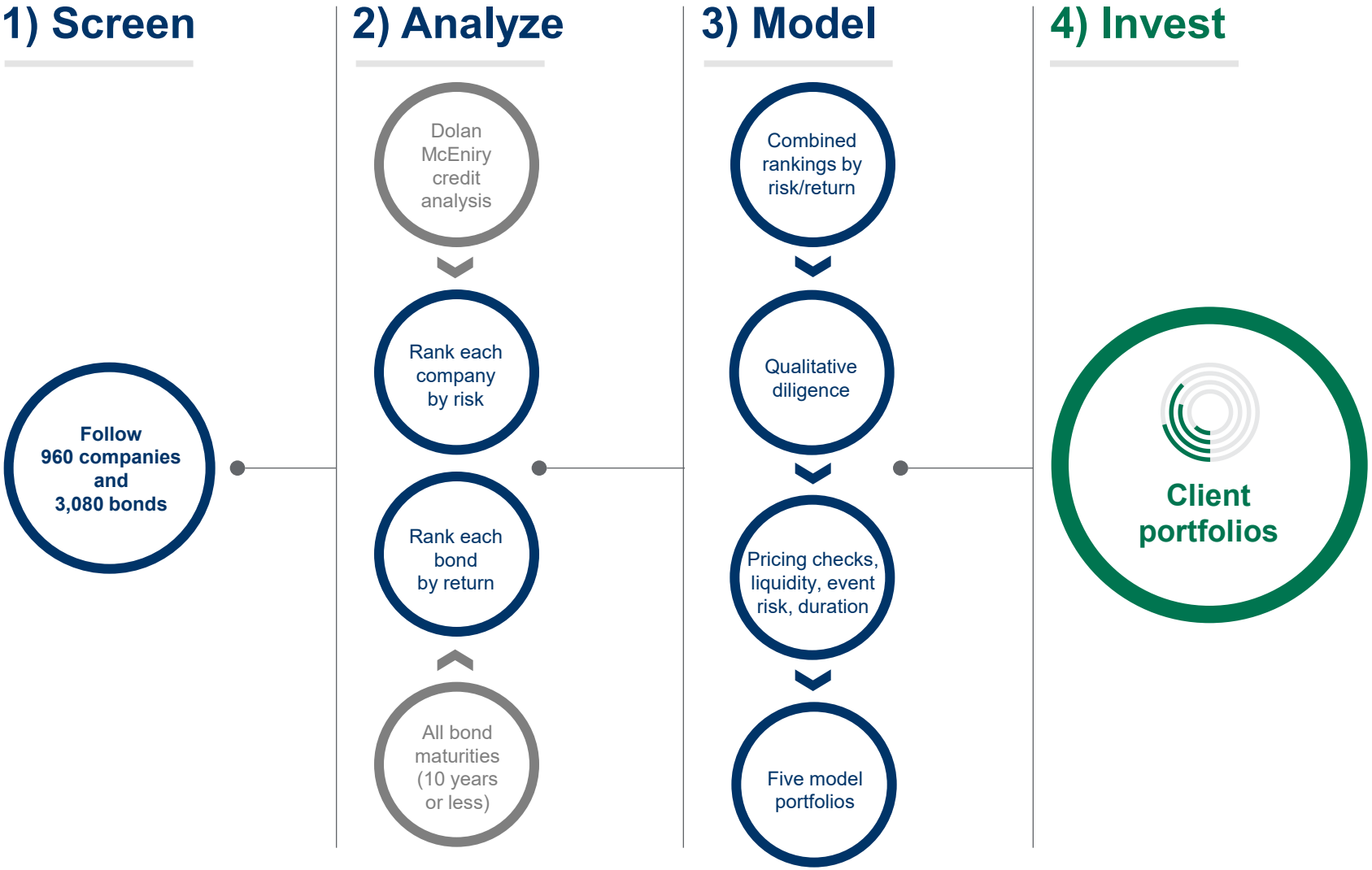
Investment Process



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Dolan McEniry Products

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Dolan McEniry Core Product

Data through August 31, 2026

	Dolan McEniry Core	Bloomberg U.S. Intermediate Credit	Bloomberg U.S. Aggregate
Number of Issuers	45	880	1,156
Asset Allocation:			
U.S. Treasuries	2%	0%	46%
Government Related	0%	15%	4%
U.S. Mortgage-Backed Securities	0%	0%	25%
U.S. Corporate Credit Securities – Investment Grade	97%	85%	24%
U.S. Corporate Credit Securities – High Yield	0%	0%	0%
U.S. Asset-Backed Securities	0%	0%	0%
Cash	1%	0%	0%
Effective Duration	3.96 years	4.05 years	5.85 years
Average Coupon	4.68%	4.47%	3.79%
Current Yield	4.71%	4.59%	4.14%
Yield to Worst	5.28%	5.12%	5.01%
Yield to Maturity	5.29%	5.13%	5.01%

*Characteristics listed above are for the Dolan McEniry Core composite. Individual accounts will not necessarily share the same characteristics. Generally, individual accounts hold approximately 40-45 issuers.

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Appendix

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Dolan McEniry Team

Name	Years with firm	Title
Daniel D. Dolan, Jr.	29 years	Managing Partner
Roger S. McEniry	25 years	Managing Partner
Stephen Schubert	27 years	Managing Director
Elizabeth Condon	27 years	Accounting Manager
Katheryn Calderon	20 years	Senior Managing Director
Chantal Heckman	11 years	Chief Compliance Officer and Managing Director, Client Service
Robert Greber III, CFA	11 years	Managing Director, Portfolio Management and Trading
Steven Schwartz	11 years	Managing Director, Investment Operations
Jessica Murphy Glyman	9 years	Executive Business Administrator
Brent Piechocki	7 years	Senior Associate, Investment Operations
Trevor Stapleton	6 years	Senior Associate, Client Service and New Business Development
Riley Liegel	5 years	Portfolio Manager
Jessica Orozco	4 years	Senior Associate, Client Service
Navneet Dahiya	4 years	Investment Analyst
Stephanie Jones	3 years	Senior Associate, Investment Operations & Compliance
Holli Hammerand	3 years	Senior Associate, Client Service and Business Development
John Dattilo	3 years	Investment Analyst
Nick Breslin	2 years	Senior Associate, Investment Operations
Sarah Ashby	2 years	Administrative Assistant
Rima Patel	2 years	Investment Operations Associate
Ryan Wieneke	2 years	Investment Operations Associate
Julia Doyle	1 year	Client Service and Business Development Associate
Lexye Barcenas	1 year	Client Service and Business Development Associate
Michael Somary	1 year	Investment Analyst
Devashree Goenka	1 year	Investment Analyst
Jeff Kratz	<1 year	Client Service and Business Development Associate
Chloe Netzel	<1 year	Investment Operations Associate

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Dolan McEniry Core Performance

Data through August 31, 2026

Year	Total Firm Assets (USD Millions)	Composite Assets (USD Millions)	% of Bundled Fee Accounts	Composite Accounts at Year-End	Composite Gross Return	Composite Net Return	Composite Net of Maximum Annual Advisory and Maximum Product Fee[3]	Bloomberg U.S. Intermediate Credit Return	Bloomberg U.S. Aggregate Return	Composite[1] Dispersion	3-Yr Annualized St Deviation (%)[2]		
											Dolan McEniry Core	Bloomberg U.S. Intermediate Credit	Bloomberg U.S. Aggregate
2003*	674	12.1	0.0	1	1.64%	1.51%	0.90%	0.39%	0.32%	N/A			
2004	776	13.6	0.0	1	4.40%	4.22%	1.42%	4.08%	4.34%	N/A			
2005	1,051	13.8	0.0	1	1.44%	1.19%	-1.46%	1.42%	2.43%	N/A			
2006	1,116	14.1	0.0	1	4.27%	4.01%	1.29%	4.49%	4.33%	N/A			
2007	1,181	17.0	0.0	1	7.05%	6.79%	3.99%	5.60%	6.97%	N/A			
2008	1,182	17.2	0.0	1	1.31%	1.05%	-1.58%	-2.76%	5.24%	N/A			
2009	1,969	18.4	0.0	1	17.00%	16.71%	13.70%	15.93%	5.93%	N/A			
2010	2,365	18.1	0.0	1	9.17%	8.90%	6.07%	7.76%	6.54%	N/A			
2011	2,873	19.0	0.0	1	6.56%	6.30%	3.53%	5.37%	7.84%	N/A	2.90%	3.85%	2.78%
2012	3,939	21.6	0.0	1	7.15%	6.89%	4.09%	8.10%	4.21%	N/A	2.11%	2.85%	2.38%
2013	4,063	22.7	0.0	1	2.41%	2.16%	-0.52%	-0.17%	-2.02%	N/A	2.23%	3.00%	2.71%
2014	4,939	68.8	0.0	2	5.28%	4.98%	2.30%	4.16%	5.97%	N/A	2.27%	2.66%	2.63%
2015	4,903	60.4	0.0	2	1.48%	1.17%	-1.41%	0.90%	0.55%	N/A	2.52%	2.58%	2.88%
2016	5,886	67.9	0.0	3	5.78%	5.47%	2.77%	3.68%	2.65%	N/A	2.74%	2.47%	2.98%
2017	6,339	265.5	72.2	17	5.48%	5.22%	2.46%	3.67%	3.54%	N/A	2.61%	2.29%	2.78%
2018	6,176	256.1	68.4	25	-0.56%	-0.79%	-3.40%	0.01%	0.01%	0.11%	2.50%	2.19%	2.84%
2019	6,934	175.6	52.9	12	11.70%	11.42%	8.54%	9.52%	8.72%	0.17%	2.32%	2.16%	2.87%
2020	7,994	223.8	53.1	19	7.56%	7.28%	4.49%	7.08%	7.51%	0.20%	6.08%	4.23%	3.36%
2021	7,661	201.2	63.4	23	-0.30%	-0.55%	-3.16%	-1.03%	-1.54%	0.10%	6.06%	4.27%	3.36%
2022	7,354	177.6	53.1	17	-8.08%	-8.31%	-10.74%	-9.10%	-13.01%	0.17%	7.03%	5.72%	5.77%
2023	9,492	243.8	66.7	19	7.83%	7.55%	4.74%	6.94%	5.53%	0.42%	5.19%	5.48%	7.14%
2024	12,612	323.0	70.5	36	4.64%	4.38%	1.66%	4.01%	1.25%	0.18%	5.53%	5.86%	7.72%
2025	13,756	432.8	77.0	68	7.76%	7.49%	4.70%	7.88%	7.30%	0.12%	3.83%	4.12%	5.98%
YTD 2026	14,367	537.1		141	0.59%	0.42%	-1.34%	0.39%	-0.31%				
Month					0.31%	0.29%	0.07%	0.26%	0.39%				
Last 12 months					2.59%	2.33%	-0.35%	2.36%	1.89%				
Last 2 years					4.19%	3.92%	1.21%	3.95%	2.51%				
Last 3 years					5.88%	5.63%	2.87%	5.49%	4.08%				
Last 5 years					2.15%	1.89%	-0.77%	1.61%	-0.29%				
Last 7 years					2.90%	2.65%	-0.04%	2.26%	0.68%				
Last 10 years					3.36%	3.09%	0.41%	2.61%	1.40%				
Last 20 years					4.96%	4.69%	1.97%	3.88%	3.13%				
Since inception					4.76%	4.50%	1.77%	3.74%	3.13%				

1. Composite dispersion is not presented for years where there are 5 or fewer portfolios in the composite for the full year because it is not statistically meaningful.
2. The 3-year ex-post standard deviation is not required to be presented for periods prior to 2011 or when 36 monthly composite returns are not available. Monthly gross composite returns are used in the calculation.
3. Returns are calculated and presented as net of maximum annual advisory fee, 2.50%, plus the maximum product manager fee, 0.40%.

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Disclosures

Dolan McEniry Core

Compliance Statement

Dolan McEniry Capital Management, LLC claims compliance with the Global investment Performance Standards (GIPS®) and has prepared and presented this report in compliance with the GIPS standards. Dolan McEniry Capital Management, LLC has been independently verified for the periods September 30, 1997 through December 31, 2025. A firm that claims compliance with the GIPS standards must establish policies and procedures for complying with all the applicable requirements of the GIPS standards. Verification provides assurance on whether the firm's policies and procedures related to composite and pooled fund maintenance, as well as the calculation, presentation, and distribution of performance, have been designed in compliance with the GIPS standards and have been implemented on a firm-wide basis. The Dolan McEniry Core Composite has had a performance examination for the periods September 30, 2003 through December 31, 2025. The verification and performance examination reports are available upon request.

*Dolan McEniry Core inception date is September 30, 2003; 2003 is a three month period.

Definition of the Firm

Dolan McEniry Capital Management, LLC is an independent investment management firm established in 1997 and is an SEC registered investment adviser. Registration of an adviser does not imply a certain level of skill or training. Dolan McEniry Capital Management, LLC manages fixed income accounts utilizing Dolan McEniry's specific strategies for institutional and individual clients.

Definition of the Composite

As of May 31, 2025, the Dolan McEniry Investment Grade Composite was renamed the Dolan McEniry Core Composite. Dolan McEniry Core is a fixed income investment product benchmarked against the Bloomberg U.S. Intermediate Credit Index or Bloomberg U.S. Aggregate Index. In this strategy, the firm utilizes entirely U.S. corporate investment grade bonds and U.S. Treasury securities. Dolan McEniry Core is approximately 100% U.S. investment grade securities. The Dolan McEniry Core Composite was created on December 31, 2015 and includes investment grade only accounts going back to September 30, 2003.

Non-fee paying accounts represented less than 2% of the composite assets for all periods shown before December 31, 2019. As of December 31, 2019, there were 2.46% non-fee paying accounts in the composite. Non-fee paying accounts represented less than 2% of the composite assets as of December 31, 2020, 2.05% of the composite assets as of December 31, 2021, no non-fee paying assets as of December 31, 2022, and less than 2% of the composite assets as of December 31, 2023. Non-fee paying accounts represented less than 2% of the composite assets as of December 31, 2024. Non-fee paying accounts represented less than 2% of the composite assets as of December 31, 2025.

Benchmark

Bloomberg U.S. Intermediate Credit Index
The Index is the intermediate component of the Bloomberg U.S. Credit Index. The Bloomberg U.S. Credit Index measures the investment grade, US dollar-denominated, fixed-rate, taxable, corporate and government –related bond markets. It is composed of the US Corporate Index and a non-corporate component that includes foreign agencies, sovereigns, supranationals, and local authorities.

Bloomberg U.S. Aggregate Index
The Index is a broad-based flagship benchmark that measures the investment grade, U.S. dollar-denominated, fixed-rate taxable bond market. The Index includes Treasuries, government-related and corporate securities, MBS (agency fixed-rate and hybrid ARM pass-throughs), ABS, and CMBS (agency and non-agency).

Intra-month cash flows from interest and principal payments contribute to monthly Index returns but are not reinvested at a short-term reinvestment rate between rebalance dates. At each rebalancing, cash is effectively reinvested into the returns universe for the following month so that Index results over two or more months reflect monthly compounding. One cannot invest directly in an Index.

List of Composites

A complete listing and description of all composites, limited distribution pooled funds, and broad distribution pooled funds is available upon request.

Dispersion

The dispersion of annual returns is measured by the asset weighted standard deviation across gross portfolio returns represented within the composite for the full year.

Performance

Gross and net performance is net of all trading expenses. Composite Net Returns are presented net of actual investment management fees. Composite Net of Maximum Annual Advisory and Product Fee returns are calculated by subtracting 1/12th of 2.90% from the monthly gross return. 2.90% represents the maximum wrap fee that a sponsor may charge clients seeking investment management services in the designated strategy. Wrap fees may include, among others, custodial fees, portfolio management fees, administrative fees and transactional fees. The maximum product fee Dolan McEniry charges for management of a client portfolio is 40 basis points. The maximum wrap fee charged by a wrap platform is 250 basis points annually. All returns are based in U.S. dollars and computed using a time-weighted total return. Composite returns are asset weighted individual portfolios computed monthly. Returns for periods exceeding 12 months are annualized. The Dolan McEniry Core Composite includes both price performance and coupon/dividend income as do the Bloomberg U.S. Intermediate Credit Index and Bloomberg U.S. Aggregate Index. Results reflect the reinvestment of dividends, interest and other earnings. The Dolan McEniry performance reflected above is not necessarily indicative of future results and, as a composite of different accounts, does not necessarily reflect the exact performance of any specific account. Policies for valuing investments, calculating performance, and preparing GIPS Reports are available upon request.

Fee Schedule

Dolan McEniry Capital Management, LLC's standard fee is 0.40% (40bps) of assets under management.

Disclaimer

Past performance is no guarantee of future results. Investing is speculative and involves risk, including the possible loss of principal. Historical returns should not be used as the primary basis for investment decisions. This product should be considered based on the suitability of its strategy in relation to return objectives, risk tolerances, and other investments. Although the statements of fact and data in this document have been obtained from or based upon sources believed to be reliable, Dolan McEniry Capital Management, LLC makes no warranties or representation as to their accuracy, correctness, or reliability, and assumes no liability or responsibility for any omissions or errors.

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Additional Indexes

Bloomberg U.S. Corporate Index

The Bloomberg US Corporate Bond Index measures the investment grade, fixed-rate, taxable corporate bond market. It includes USD-denominated securities publicly issued by US and non-US industrial, utility and financial issuers. The US Corporate Index is a component of the US Credit and US Aggregate Indices, and provided the necessary inclusion rules are met, US Corporate Index securities also contribute to the multi-currency Global Aggregate Index.

Bloomberg U.S. Corporate High Yield Index

The Bloomberg US Corporate High Yield Bond Index measures the USO-denominated, high yield, fixed-rate corporate bond market. Securities are classified as high yield if the middle rating of Moody's, Fitch and S&P is Bal/BB+/BB+ or below. Bonds from issuers with an emerging markets country of risk, based on the indices' EM country definition, are excluded. The US Corporate High Yield Index is a component of the US Universal and Global High Yield Indices.

Blomberg U.S. MBS Index

The Bloomberg US Mortgage Backed Securities (MBS) Index tracks agency mortgage backed pass-through securities (both fixed-rate and hybrid ARM) guaranteed by Ginnie Mae (GNMA), Fannie Mae (FNMA), and Freddie Mac (FHLMC). The index is constructed by grouping individual TBA-deliverable MBS pools into aggregates or generics based on program, coupon and vintage. Introduced in 1985, the GNMA, FHLMC and FNMA fixed-rate indices for 30- and 15-vear securities were backdated to January 1976. Mav 1977. and November 1982, respectively.

Bloomberg U.S. Treasury Index

The index is the U.S. Treasury component of the Bloomberg U.S. Government Index. The Bloomberg U.S. Treasury Index measures the public obligations of the U.S. Treasury with a remaining maturity of one year or more.

Bloomberg U.S. Corporate High Yield Ba/B Index

The Index is the Ba/B component of the Bloomberg US Corporate High Yield Index. The Index measures the USD-denominated, high yield, fixed-rate corporate bond market. Bonds from issuers with an emerging markets country of risk, based on the indices' EM country definition, are excluded. The corporate sectors include industrial, financial institutions, and utility. Bonds must have at least one year until final maturity.

S&P 500 Index

The S&P 500® is widely regarded as the best single gauge of large-cap U.S. equities and serves as the foundation for a wide range of investment products. The index includes 500 leading companies and captures approximately 80% coverage of available market capitalization.

Intra-month cash flows from interest and principal payments contribute to monthly Index returns but are not reinvested at a short-term reinvestment rate between rebalance dates. At each rebalancing, cash is effectively reinvested into the returns universe for the following month so that Index results over two or more months reflect monthly compounding. One cannot invest directly in an Index.

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Meet Dolan McEniry

Daniel D. Dolan, Jr.

Daniel founded Dolan McEniry in 1997 following a 16 year career in the financial services industry. Daniel previously worked with Morgan Stanley and Salomon Brothers after receiving a B.A. from Lake Forest College in 1980.

At Dolan McEniry, Daniel directs the investment strategy, risk management and strategic activities of the firm with Roger McEniry. Also, Daniel is responsible for client relations, new business development, and the overall administrative management of the firm.

Daniel serves as Vice Chair of the Board of Directors for the Shirley Ryan AbilityLab and Chairman of the Keystone Board for the Shirley Ryan AbilityLab. Daniel serves as a Member of the Board of Directors for US Squash and a Member of the US Squash Foundation Board. Finally, Daniel serves as a Member of the Board of Trustees of Lake Forest College and is past Chairman of the Board of Directors for MetroSquash.

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Meet Dolan McEniry

Roger S. McEniry

Roger S. McEniry is a Managing Member of Dolan McEniry. Roger directs the investment and strategic activities of the firm and oversees security selection, risk management, and credit analysis, among his other responsibilities. Prior to joining the firm in 2001, Roger spent sixteen years as a partner at a Chicago private equity firm and, before that, was with Citibank in Chicago.

Mr. McEniry is a graduate of Deerfield Academy, Williams College, and the University of Michigan Graduate School of Business. He is a trustee of Rush University Medical Center and a member of the Chairman's Council of the Daniel Murphy Scholarship Fund and is the past president of its board of directors. He is Trustee Emeritus of Deerfield Academy and served as Co-Chair of its Imagine Deerfield Capital Campaign.

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Meet Dolan McEniry

Stephen M. Schubert

A member of the Dolan McEniry team since 1998, Stephen currently serves as a Managing Director. He is a member of the Investment Team and is responsible for client relations, new business development. Steve ran the Portfolio Management & Trading team for 15 years before transitioning into client and business development. Stephen worked previously with Suntrust Bank and Merrill Lynch, and remains actively involved with the University Club of Chicago. Stephen received his Bachelor of Science degree in Finance from Michigan State University where he competed on the varsity tennis team and graduated with honors.

Katheryn G. Calderon

Katheryn joined Dolan McEniry in 2005 and is now Senior Managing Director. Katheryn oversees Business Development and Client Services as well as the daily implementation, management, and oversight of the firm. Her previous experience includes work with the Chicago Mercantile Exchange as a Trading Clerk for a Eurodollar Options Trader. Katheryn holds a Bachelor of Arts in Psychology from Georgetown University.

Chantal M. Heckman

Chantal joined Dolan McEniry in February 2015. She currently serves as the firm's Chief Compliance Officer and Managing Director of Client Service. She is responsible for overseeing Dolan McEniry's compliance program and client service. Chantal graduated from Knox College in 2014 with a B.A. in Economics and Integrated International Studies. She was a four-year member and captain of the Knox College women's basketball team. Before joining Dolan McEniry, Chantal worked at Incapital, LLC.

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Meet Dolan McEniry

Robert W. Greber III, CFA

Robert joined Dolan McEniry as an Operations Associate in February 2015. In January 2018, Robert joined the investment team as an Analyst. He currently serves as a Managing Director of Portfolio Management & Trading and Co-Head of the Investment Team. In 2014, Robert received his Bachelor of Science in Business Administration; Finance & Banking from the University of Missouri Robert J. Trulaske College of Business. Robert is currently working towards a Master of Science in Applied Mathematics from DePaul University College of Science and Health. Robert is a CFA Charterholder.

Steven J. Schwartz

Steven joined Dolan McEniry as an Operations Associate in March 2015. He currently serves as a Managing Director of Investment Operations. Steven graduated from Roosevelt University with a B.A. in Accounting and Finance in December 2014. He was a member of the Roosevelt University Varsity baseball team.

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