



Gilbert Andrew Garcia, CFA

Managing Partner, Chief Investment Officer, Portfolio Manager

Investment Experience: 39 Years

Firm Experience: 22 Years

Mr. Garcia received a B.A. in Economics from Yale University. After graduating in 1985, he joined Salomon Brothers in New York City where he became a Vice President specializing in mortgage-backed securities. In 1990, he moved to Houston to join former Mayor Henry Cisneros in building Cisneros Asset Management Company, ultimately becoming its President. In 2002, he joined Garcia Hamilton & Associates, and is the Firm's Managing Partner. Under his leadership, the Firm has grown from \$200 million in fixed income assets under management to over \$20 billion (as of December 31, 2023). As a previous CNBC contributor, Mr. Garcia regularly shared his insights into the bond market with consumers and investors.

Mr. Garcia most recently served as a member of the Treasury Advisory Committee on Racial Equity, a newly created FACA Committee convening under the U.S. Department of the Treasury to identify, monitor, and review aspects of the domestic economy that have directly and indirectly resulted in unfavorable conditions for Black, Latino, Asian Americans, and other persons of color. He served on two other FACA Committees with the SEC: the Fixed Income Market Structure Advisory Board and the Asset Management Advisory Committee, where he led the Diversity and Inclusion subcommittee. Mr. Garcia is the longest serving board member with Chairman Henry Kravis on the Board of Directors of SEO, a non-profit providing summer internships on Wall Street for minority undergraduates, and he was awarded SEO's Alumni Leadership Award in 2015 alongside other honorees, including the former mayor of New York City, Michael R. Bloomberg, and Co-Founder & Co-CEO of The Carlyle Group, David M. Rubenstein.

Mr. Garcia and GH&A have received numerous industry recognitions. The Firm most recently received *Pensions & Investments'* Best Places to Work in Money Management for the seventh year (2023, 2022, 2020-2016). Previously, *Emerging Manager Monthly* has awarded the Firm Fixed Income Manager of the Year in 2019, 2018, and 2010. In 2022, Mr. Garcia was also recognized as a Diversity Champion by *Houston Business Journal* from 2023-2021 for his promotion of diversity and inclusion in the Houston community. In 2020, Mr. Garcia received NASP's Maynard Holbrook Jackson, Jr. Award, which was established to honor the financial services professional who best exemplifies entrepreneurial achievement, community service, and high moral standards. In 2019, he was awarded Houston's Most Admired CEOs, and the Firm was ranked among Houston's Best Places to Work in 2018. Other past awards include Institutional Investor's Intermediate-Term Fixed Income Manager of the Year in 2016 and 2015 and Institutional Investor's 2014 Fixed Income Investment Grade Manager of the Year. In 2018, Mr. Garcia was co-chair for the Susan G. Komen Race for the Cure. The same year, he was awarded "Male Entrepreneur of the Year 2018" by the Houston Hispanic Chamber of Commerce. Mr. Garcia was recognized by American Jewish Committee Houston (AJC Houston) with the Human Relations Award in 2016.

In 2022, Mr. Garcia was the Co-Grand Marshall of the 44th Annual Martin Luther King Jr. parade in Houston, Texas. From 2010 - 2016, Mr. Garcia served as Chairman of the Metropolitan Transit Authority of Harris County where he implemented the "Garcia Rule," which requires at least one diverse investment manager be included in every asset class search. Under his leadership, METRO received transparency awards and earned the 2015 APTA Award for Outstanding Public Transportation System Achievement. Mr. Garcia recently served as a member of the Board of Trustees for Dallas Police & Fire Pension System. He was previously a member of the Board of Directors of the Yale Club of Houston as well as of the Board of Trustees of the Houston Municipal Employees Pension System, and he served as Secretary of the Board of Directors of the Houston Downtown Management District for 13 years. In addition, he is a Class X graduate of Leadership Houston. Mr. Garcia is married with four children.

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