



MARK OBERROTMAN - Executive Director of Client Relations



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Mark joined our firm in 2004 and is a member of the investment committee. He is a Registered Investment Advisor. He develops new opportunities for our parent firm's Mutual Fund and Separate Account business, including the advisor and broker/dealer channels, institutional channels, 401k marketplace, and among high net worth individuals. Mark has extensive experience raising and managing assets of high net worth individuals and is deeply engaged in client servicing. Over Mark's more than twenty years of experience in the investment industry, he has been employed by a variety of investment firms, including Thomson McKinnon, Lehman Brothers, and Paine Weber.

Q: Tell us your history.

A: As a graduate of the University of Illinois with a degree in Mechanical Engineering I started right out the gate into the engineering world with an old line Fortune 500 company, Continental Can. I started my financial services career with Thomson McKinnon Securities as a stock broker working with high net worth individuals. An early experience of the 1987 market crash opened my eyes to how the market works as well as gave me plenty of stories (which my co-workers are tired of but please ask me to share).

Q: What was the business like in the early days?

A: In the early days if you didn't have connections you built your business by going door to door, making cold calls, or both, which I did until eventually managing as much as \$50 million. My experience managing clients and my own book of business has helped me connect with clients with whom I am often found coaching on life and business strategy along with the merits of diversified investing.

Q: How did you get started at Windgate?

A: I met Windgate Wealth Management owner and Portfolio Manager Michael Corbett more than fifteen years ago after discussing small company names as a sell-side broker. At Windgate you will find me opening up distribution agreements, creating wealth management materials and tending to the needs of clients.

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Q: What do you enjoy outside of work?

A: I enjoy international and outdoor travel and has recently visited Istanbul, Australia, Galapagos Islands, Europe as well national parks like Yosemite, Tetons and Yellowstone.

