

STERLING CAPITAL'S

MONTHLY ASSOCIATE SPOTLIGHT FEATURING

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Q: What is your best memory from your time at Sterling?

A: There are abundant “best” memories to share but the common thread throughout are the activities shared with colleagues that I’ve worked with over the past 33 years. We have had a lot of fun whether it was the overnight team building outings, “over the hill” birthday parties, holiday parties or family baseball outings. Our business works well when there is teamwork and all of these activities strengthened our working relationships.

Q: What is the biggest lesson you’ve learned throughout your career in asset management?

A: That change is inevitable and constant! Part of our mission statement is to embrace change. In 33 years, I have experienced change of ownership, leadership, technology and investment trends. I’ve learned that a positive attitude generally overcomes any doubts and makes way for a smooth transition.

Q: Who is someone you really admire and why? What is your favorite Sterling tradition?

A: These two questions go together. One of my favorite Sterling traditions is the Olin Nisbet Mission Statement Award. I was thrilled when this award was renamed to honor our founder, Olin Nisbet. It is always exciting to hear who the winner is each year.

I had the pleasure of working with Olin from 1985 until he died in 2007. I had such respect for Olin and considered him a friend and mentor. I personally saw Olin work with clients and how he inspired confidence and loyalty. He was a person you could trust. Over the many years of working with clients, I have found that trust is a key ingredient of a successful client/advisor partnership.

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