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**INVESTMENT MANAGEMENT FIRM, LSIA, TAPS INDUSTRY VETERAN  
KAREN MCCLINTOCK AS NEW PRESIDENT AND CEO**

**- Industry Innovator Provides New Leadership with First Female President  
& Chief Executive Officer to Spearhead Nationwide Offices  
in Detroit, Milwaukee, Pasadena, and Boca Raton -**

**(BLOOMFIELD HILLS, MI) — July 28, 2020** — LSIA, an innovative investment management firm based in the greater Detroit area, with offices throughout the country, today announced Karen McClintock as its new President and Chief Executive Officer. Since co-founding the company in 2008, she has previously served on the firm’s Executive Committee and is based in Pasadena, California. Leveraging her deep industry expertise and passion for client service, she works closely with individuals, families and institutions to understand their financial concerns and customize a plan to help meet their specific needs, with the goal of providing them with financial peace of mind.

“As CEO, I’m proud to be part of a team that celebrates our client promise and core values, every day, through what we call ‘The LSIA Way’. This is the driving principle that defines the manner in which we work for our clients as industry experts, trusted partners, and caring people,” said Karen, who is also the first female President and Chief Executive Officer in the firm’s history. “At LSIA, we truly feel honored to serve our clients, when and where they need us, and look forward to helping others in a currently unsettling world.”

With a successful career spanning more than 30 years, Karen combines her extensive knowledge of investment markets and excellence in client service to assist her wealth and institutional clients with all aspects of their financial well-being, including investments, risk management, retirement income and/or tax, insurance and estate planning. Prior to launching LSIA with the other founding members, she managed investment portfolios as part of Portfolio Management Partners (a former division of Natixis Asset Management Advisors, LP) and Loomis, Sayles & Company, LP. Before joining Loomis Sayles, Karen worked for The Boston Company Asset Management, LLC, where she assumed both portfolio management and client service responsibilities. She also conducted valuation analyses of privately held firms at CAST Management Consultants and Deloitte, as a valuations manager.

“Over the past decade with the company, Karen continues to be a tremendous driver for industry innovation and corporate culture,” said Mark Shank, LSIA’s Chief Investment Officer-Active. “A true champion of putting people before profits, she genuinely listens to our clients in helping them

strive to achieve their financial goals, and we are incredibly proud to welcome her as our new President and Chief Executive Officer.”

Karen earned an MBA from University of Southern California and a BA from San Diego State University. She holds the Chartered Financial Analyst® designation and is a Chartered Investment Counselor. Karen is also a member of the CFA Institute and CFA Society of Los Angeles.

**About LSIA:**

Based in Bloomfield Hills, Michigan, LSIA opened its doors in 2008 as an innovative investment management firm, and has offices nationwide in Milwaukee, WI; Pasadena, CA; and Boca Raton, FL. LSIA is not your typical investment management firm. Experience for yourself a better way... The LSIA Way. For more information, visit [myLSIA.com](http://myLSIA.com) and follow us on [linkedin.com/company/lsiawealth/people/](https://www.linkedin.com/company/lsiawealth/people/).

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