**Dallin Pennington**

Dallin Pennington is the Financial Strategist and Founder who partners with C-Suite Executives, Family Offices, Real Estate Investors and Closely Held Business Owners to protect and maximize their wealth. After spending 15 years in the commercial banking and wealth management as a commercial and private lender Dallin developed a comprehensive approach to asset protection and wealth preservation. The comprehensive approach creates a plan that focuses on the client’s income tax first with wealth preservation and asset protection as the end result. The comprehensive strategy coordinates the clients CPA, Attorney, Financial Advisor, Corporate CFO and Trustees to ensure all areas of a client’s portfolio are considered and appropriately managed.

Dallin has a Bachelor of Science in Business and Finance from California State University. He his wife and two girls live in Lake Oswego, Oregon; a small suburb of Portland, Oregon. In his spare time he is an avid marksman, hunter and craftsman, enjoying the outdoors and completing home remodel projects. He currently sits on the Board of Directors for Union Gospel Mission of Portland.

**John Courtney**

John Courtney is the CFO and Strategist for our closely held businesses. As a former CPA, he takes in-depth roles in closely held companies as a financial consultant during times of exit or transition.

As a Key Executive, John Courtney, is noted for integrating new financial delivery strategies and restructuring and streamlining operations. An astute communicator able to interact positively with Senior Managers and Owners to design strategies that outpace business objectives. Recognized for consistently utilizing keen analysis and insights to drive organizational implementations and improvements. Equally strong in building and leading highly successful teams while cultivating a positive and success driven work environment. Tenacious leader with a verified talent in gracefully managing the dynamics of changing responsibilities and environments. Effective problem solver, demonstrating critical thinking skills, collaboration, and curiosity to create strategic and tactical business plans across several industries.