



WHEN IT COMES TO WEALTH &  
INVESTMENT MANAGEMENT...

EXPERIENCE *COUNTS*.

**SWM Advisors is proud to be a resource for you as a LocumTenens.com physician should you need quality investment advice. As a LocumTenens.com physician, caring for patients is your business. When you need to invest your hard-earned cash, that's our business.**

## OUR FIRM

SWM Advisors is an SEC registered investment advisory firm that applies a low-cost, diversified, and risk-appropriate approach to its investment management process – a process originally developed by Nobel Laureates. To align with your unique goals and tolerance for risk, we offer a full range of investment portfolios from Conservative to Aggressive.

## OUR FIDUCIARY STANDARD

We are fiduciaries with the legal obligation to put clients' interests first. That means fee-only investment advice, a fully transparent investment process, and eliminating of the conflicts of interest inherent with commission-driven brokerage platforms. As a fiduciary, we sit on the same side of the table as our clients.

## OUR EXPERIENCE

In today's global markets experience means a great deal. Our investment professionals have decades of experience working with high net-worth individuals, retirement plans, foundations, and some of the world's largest and most sophisticated corporations, sovereign wealth funds and foreign central banks.



For more information, contact Matt DiGennaro at 727.456.0011 ext 1 or [matt@swm3.com](mailto:matt@swm3.com)

\$500,000 minimum account size\*

**SWM3.COM**

\*The minimum account size may be waived based on client need, complexity or uniqueness of the situation.



# OUR TEAM



**Matt DiGennaro**  
Founder & CEO

Matt has spent over 25 years on Wall Street working in the securities and asset management business in various sales, trading and executive roles. Prior to forming Seabridge, he was head of Bank of America’s \$38 billion asset management division for Europe, Middle East, Latin America and Asia. In addition to U.S. corporations, Matt has worked with some of the world’s largest multi-national corporations, sovereign wealth funds and foreign central banks. Matt earned his B.A. and M.B.A. in finance from Florida State University.



**Valerie DiGennaro**  
Managing Partner

Valerie joined Seabridge with 20 years of experience in commercial and corporate banking, serving as a trusted advisor to middle-market companies and executives throughout Florida’s west coast. Her prior roles include Commercial Executive for Cadence Bank, Regional Director for Citi, and Senior Vice President for Wells Fargo. Valerie serves on several boards in the Tampa Bay area and is a graduate of Leadership Tampa Bay, Leadership Tampa, and Leadership Pinellas. Valerie earned both her B.S. and M.B.A. from the University of Florida.



**Doug Case, CFA, CAIA**  
Chief Investment Officer

Doug has accumulated over 25 years of experience in the asset management industry and previously was President & CIO for Advanced Investment Partners where he was responsible for over \$2 billion in AUM with clients ranging from HNW individuals to some of the world’s largest pension plans. Previously, Doug was a senior investment manager responsible for over \$10 billion with Florida’s public employee retirement system. Doug earned his MBA from Florida State University and received dual undergraduate degrees from the University of Pittsburgh in Applied Mathematics and Business Administration.



**Vikram Kuriyan, PhD, CFA**  
Chief Market Strategist

Dr. Kuriyan was previously Chairman of the Global Asset Allocation Committee and global head of Quantitative Strategies at Bank of America’s asset management division managing over \$40 billion of client assets. Dr. Kuriyan earned his PhD at Harvard University specializing in capital markets. He also earned a Master’s degree in Applied Mathematics from Harvard University and a B.S. in Electrical Engineering from the Massachusetts Institute of Technology. Dr. Kuriyan is currently an advisor to the India Securities & Exchange Board and faculty member of the Indian School of Business.



**Andi Mullins, CPA**  
Chief Compliance Officer

Prior to joining Seabridge as Chief Compliance Officer, for 20-years, Andi held various accounting and operations positions in the asset management businesses of Raymond James Financial. While there, she was Chief Financial Officer of the Eagle Family of Funds, with over \$5.7 billion in assets. In 2013, Andi became a member of the board of directors for the Valued Advisers Trust. Within this role she serves as the chairperson of the audit committee. Andi holds B.S. degrees in accounting and finance from Florida State University, and is a CPA in Florida.