



# UCI IRVINE | THE PAUL MERAGE SCHOOL OF BUSINESS

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## FOR IMMEDIATE RELEASE

### **New Co-Chairs Announced for Advisory Board of The Center for Investment & Wealth Management at the Paul Merage School of Business**

**IRVINE, CA – (December 16, 2009)** - The Paul Merage School of Business today announced the installation of the new incoming chairs of The Center for Investment and Wealth Management Advisory Board. **Pat Soldano**, chairman and president of GenSpring Family Offices Southern California, and **Rick Keller**, CEO of First Foundation Advisors will lead the Center's board over the next year.

“Our mission is to create and disseminate vital, applicable knowledge concerning the creation, management and transfer of wealth, said **Andrew J. Policano**, dean at The Merage School. “We maintain an educational focus and outlook to prepare our MBA students for success in wealth management and related career paths. I am confident that our new Co-Chairs will help take us to the next level to achieving our goals.”

**Mark Moehlman**, founding chair of the Center for Investment and Wealth Management and principal of the Wealth Management Network commented, “I am delighted that Dean Andy Policano has selected Pat and Rick as the new leaders of this influential group. Over the past 4 years, we have seen this Center of Excellence move from its infancy to a growing advisory board of 40 members that actively participate in quarterly meetings, programs for professionals, and events that are sponsored for the community. I have felt that there has been a need for this type of professional support group at UC Irvine for many years, and Dean Policano has had the vision to recognize and execute.”

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“I joined the CIWM because I believe in its mission of educating MBA students in investment and wealth management disciplines,” stated **Pat Soldano**. “This focus will benefit both students and the industry as we prepare future leaders in the dynamic and challenging wealth management industry. Ongoing education of client families as well as our own staff is a cornerstone at GenSpring and is therefore a natural fit with CIWM.”

**Rick Keller** added, “As a longtime supporter of the university, I have watched as Dean Andy Policano has worked closely with leaders in the business community to create mutually beneficial relationships. Of particular interest to me is the Center for Investment and Wealth Management. I’m delighted to accept the co-chair position of the Center and look forward to working with distinguished colleagues from the investment and wealth management fields. Contributing to the profession for both students and current professionals is a real honor.”

The Center for Investment and Wealth Management at the University of California Irvine and is a Center of Excellence with the following focus areas:

- Examine and research a complex set of issues surrounding wealth management that affect both the future well-being of individual families and overall economic vitality both at home and abroad.
- Study these subjects and related issues in a highly interdisciplinary and inclusive environment, under the direction of Dean Policano and our renowned faculty
- Solicit the expertise of individuals in the community: to mentor, teach and advise students, to develop and deliver timely programs for the community and to serve on an advisory board that helps to shape the Center’s strategy and activities.
- Produce research that both adds to the fundamental base of knowledge in wealth management and provides applicable, relevant source material for the professional community.

For more information please contact acting Director of CIWM Mitchell Spann at [mwspann@uci.edu](mailto:mwspann@uci.edu).

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**About The Paul Merage School of Business at UC Irvine**

The Paul Merage School of Business at UC Irvine offers four dynamic MBA programs – plus PhD and undergraduate business degrees – that deliver its thematic approach to business education: sustainable growth through strategic innovation. It graduates leaders with the exceptional ability to help grow their organizations through analytical decision-making, innovation and collaborative execution. In-class and on-site experiences with real-world business problems give students the edge needed to help companies compete in today’s global economy. For more information visit the website at [merage.uci.edu](http://merage.uci.edu).

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