



**Nico B.M. Letschert (CFP®)**

**Nico Letschert**, born in the Netherlands, is the founder and CEO of Noesis and has been largely responsible for shaping the firm's strategic vision. Nico has over 40 years of experience in the investment industry, beginning his career on the Amsterdam Stock Exchange in 1972. Nico is one of the firm's Portfolio and Relationship Managers. He holds a degree from the Dutch Institute for Banking and Finance and is a Certified Financial Planner™ certificant.



**Jerry Spitzberg (CFA, CPA)**

**Jerry Spitzberg**, born in Texas, is a founding partner and one of the firm's Portfolio and Relationship Managers. Jerry is responsible for overall portfolio allocation, trading execution and oversees the firm's custodial relationships. Jerry holds a B.S. in Finance and Accounting from Florida Atlantic University and holds the Chartered Financial Analyst designation. Jerry is a member of the CFA Institute, the CFA Society of South Florida and is a licensed Certified Public Accountant.



**Barry M. Berkeley (MBA)**

**Barry M. Berkeley**, born in Brooklyn, heads the Fixed Income Department and is one of the firm's Portfolio and Relationship Managers. Prior to joining Noesis, Barry was a Senior Portfolio Manager and Investment Officer at Citigroup for 22 years and was a member of the board of directors of Citicorp Trust, Florida. He holds a B.B.A. in Accounting and Business Administration from Pace University and an M.B.A. in Finance and Investments from Baruch Graduate School.



**Jennifer Tang (CFP®, MBA)**

**Jennifer Tang**, born in Taiwan, is the Operations Manager and is responsible for support services and account administration. Prior to joining Noesis, Jennifer worked as an Operations Analyst with Lehman Brothers. Jennifer holds a B.A. in International Finance and Marketing from University of Miami and an M.B.A. from Florida Atlantic University. She is a Certified Financial Planner™ certificant and a member of Financial Planning Association.



**Shihfang Chuang**

**Shihfang Chuang**, born in Taiwan, is an Equity Research Analyst and is in charged of the firm's information systems. Prior to joining Noesis, Shihfang was an IT director with International Council for Quality Care. She holds an M.S. in Management of Information Systems from Louisiana State University and a B.A. in Economics from National Taiwan University.



**Christian Paterok (CFA)**

**Christian Paterok**, born in Germany, is an Equity and Credit Research Analyst. Christian holds a degree (diploma) in Business Administration from the University of Applied Sciences, Cologne, where he majored in Accounting and International Business. Christian holds a B.B.A. from Florida Atlantic University, where he graduated Magna Cum Laude and majored in Finance. He holds the Chartered Financial Analyst designation and is a member of the CFA Institute as well as the CFA Society of South Florida.



### Stephen K. Smith (CFA)

**Stephen Smith**, born in Mississippi, is a Portfolio Manager based in the firm's Birmingham, Alabama office. Prior to joining Noesis, Steve was a Senior Vice President and Portfolio Manager at Sterne Agee Asset Management and has over 30 years of industry experience. Steve holds a B.S. in Corporate Finance and Investment Management from University of Alabama and the Chartered Financial Analyst designation. He is a member of the CFA Institute and a past-president of the CFA Society of Alabama.



### Cheryl Deknatel (CFP®, CIMA®, MBA)

**Cheryl Deknatel**, born in New York, serves as one of the firm's Relationship Managers. Cheryl has been in the investment industry for over 40 years and has worked with leading Wall Street firms and European banking institutions during her career. Cheryl holds a B.A. from Finch College and an M.B.A. from Columbia University. She is a Certified Financial Planner™ certificant and a Certified Investment Management Analyst™ designee.



### Joyce H. Chiang (CFP®, CPA, MBA)

**Joyce H. Chiang**, born in Taiwan, is a partner in our California office and is responsible for client development and relationship management. Joyce holds a B.A. in International Trading from Chung Yuan University and an M.B.A. in Accounting from the University of Missouri. Joyce is a Certified Financial Planner™ certificant and a Certified Public Accountant. She is a member of the California State Board of Accountancy and the California Society of Certified Public Accountants.



### Jeffrey Greer

**Jeffrey Greer**, born in Boston, directs business development efforts for the firm and is one of the firm's Relationship Managers. Jeffrey holds a B.A. from Brown University and is a graduate of St. Andrew's School in Boca Raton. Prior to joining Noesis, Jeffrey held similar roles with HighTower Advisors for almost four years, and Cypress Trust Company for ten years. He holds the FINRA Series 65 license.



### Bruno Gomez

**Bruno Gomez**, born in Madrid, Spain, is one of the firm's Financial Planners and Relationship Managers. Bruno holds a B.A. in Business Administration and a Masters in Strategy Management from Francisco de Vitoria University. He holds a Portfolio Manager Masters from the Institute of Stock Market Studies. Bruno has more than ten years of experience in the financial industry. Most recently he spent more than eight years at Santander Private Banking.



### Adriana Pereira (CFP®)

**Adriana Pereira**, born in Paraguay, is a Portfolio Analyst and Equity Research Analyst. Adriana holds a B.A. in Finance and Marketing and a minor in Information Technology from the University of South Carolina. Adriana is a Certified Financial Planner™ certificant. She represented her country in the Fed Cup and played four years of Division I Women's Tennis.



### Ellen Letschert

**Ellen Letschert**, born in the Netherlands, is active on all levels of the organization; front office and operations, accounting, procurement or whatever task at hand. Ellen is Nico's wife.