

Press Release: May 3rd, 2023. For Immediate Release

To: Clients and Friends of Quantum Financial Advisors

From: Michael Huber, Investment Advisor with QFA

RE: QFA's Joseph Rinaldi Offers Insight During Interview For Trustee Seat on Montgomery County Board of Investment's \$5.6 Billion Dollar Pension Fund



During an interview, Quantum Financial Advisors CIO, Joseph Rinaldi, has been asked by the Montgomery County Council to provide his expert analysis on market dynamics, as well as to vet him for the position of representative on the Board of Investment Trustees for Employee Retirement Plans and the Board of Trustees for the Consolidated Retiree Health Benefit Trust. This prestigious opportunity is a testament to Mr. Rinaldi's unparalleled expertise and knowledge in the field of financial investments.

As the Council is seeking a person who is knowledgeable in pensions, investments, or financial matters, Joseph Rinaldi's extensive experience and impressive track record make him a natural choice for the position. With over 25 years of experience in the financial industry, Mr. Rinaldi has been at the forefront of implementing innovative investment strategies that have delivered benefits for his clients. Most importantly, Mr. Rinaldi understands the role of a fiduciary, the inherent trust a fiduciary carries, and the ever-present need to put the employees' best interests first.

The Board of Investment Trustees for the Montgomery County Employee Retirement Plans is responsible for overseeing the investment of approximately \$5.6 billion in assets for approximately 16,500 active and retired members of the three retirement plans: defined benefit, defined contribution, and deferred compensation. The Board of Trustees for the Consolidated Retiree Health Benefits Trust oversees the investment program for the trust, which has assets of approximately \$1.4 billion.