

TPI Teammates & Partners

TPI has created a synergistic team of professionals, designed to help guide our clients through the complexities of insurance, mortgages, estate planning and alternative investing.

Mark O. Costley *Estate Planning Attorney & Partner with Walker, Lambe, Rhudy & Costley* With more than 20 years experience in private practice, Mark has helped hundreds of North Carolinians with estate planning, living trusts and financial law. Mark's work involves elements of teaching, strategic analysis and negotiation. Mark is also a certified court mediator and a former member of the Board of Trustees of Duke University. Mark received his AB from Duke University in 1982, and was awarded his Juris Doctorate in 1985 by the Duke University School of Law.

Robert Mann *Senior Mortgage Banker with PrimeLending, Inc.* Robert has worked in the retail financial services market since 1985 and has been a mortgage lender since 1992. He is licensed as a Mortgage Loan Originator by the state of North Carolina and is registered in the Nationwide Mortgage Licensing System. Robert received a BSBA from, UNC Chapel Hill.



Carol J. Gordon *Nationally Recognized Long Term Care Insurance Specialist* Carol is President of C. Gordon & Associates, LLC, and has more than 15 years of experience as a LTC Specialist. Carol focuses on creating the right coverage for your individual needs using top rated companies, products and plan designs.

Steve Griffin *President of Insurance People, Inc.* Steve has more than 24 years of experience in the insurance industry and specializes in business insurance. He is a native of Durham, NC, and a graduate of UNC Wilmington.



Mark W. Yusko *TPI Alternative Investment-Hedge Fund.* Mark is the President and Chief Investment Officer of Morgan Creek Capital Management, LLC, a Registered Investment Adviser formed in July 2004 to provide investment management and advisory services based on the University Endowment Model of investing. Additionally, Mark serves as the Chief Investment Officer for the Hatteras Multi-Strategy Funds. Previously, Mark served as the Chief Investment Officer for, UNC Chapel Hill from 1998 to 2004.

Mark received his B.S. degree, with honors, in Biology and Chemistry from the University of Notre Dame, and an MBA in Accounting and Finance from the University of Chicago.



Mark Burton *TPI Alternative Investment-Independent Film.* Mark is President of IndieVest Pictures, an independent film studio. He has more than 15 years experience producing Independent films. Mark most recently produced *Saint John of Las Vegas*, with Steve Buscemi, Romany Malco and Sarah Silverman.

Mark was executive producer for the third film in director Deepa Mehta's trilogy *Fire, Earth, Water*, which was nominated for the Academy Award for Best Foreign Film in 2006.

Mark is a member of the British Academy of Film and Television Arts and serves on the board of the Los Angeles Indian Film Festival. He is a Graduate of the University of Southern California.



Todd & Michael Black *TPI Alternative Investment-Real Estate.* Fall Creek Land Company is a family-owned real estate development business. Since 1993, FCLC has helped thousands of people discover their dream homes in the Western North Carolina region. FCLC is now offering home sites with spectacular views at their Grandview Peaks property.



W. Harold (Hal) Eddins *TPI Equity & Fixed Income Portfolio Management.* Hal is a vice president with the Capital Investment Council (CIC). He joined the firm in 1987, and participated in their growth from a five-person operation to a full-service firm with over 150 representatives. Hal specializes in individual equities and serves as a portfolio manager with CIC. He graduated from UNC Chapel Hill with a BS in Business Administration.



Kurt A. Dressler *TPI Equity & Fixed Income Portfolio Management.* Kurt serves as a portfolio manager with Capital Investment Counsel (CIC). He joined the firm in 1996 and has helped develop Counsel's contrarian, risk-averse investment management philosophy. Prior to joining CIC, Kurt worked with Townsend Asset Management as a portfolio manager. He holds a BS in Business Finance, with a concentration in economics from Eastern Illinois University.

TPI also offers investments in Oil & Gas Partnerships, Timber, Private Equity and Variable Annuities.

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THE TPI COMMITMENT

We are committed to *simplifying* your financial life and *increasing the efficiency* of your investment portfolio.

THE TPI PHILOSOPHY

By identifying strategic *correlations* in various asset classes, we *maximize growth and minimize volatility.*

THE TPI TEAM

Our staff consists of *experienced professionals* who are dedicated to navigating you *TO, THROUGH and BEYOND* retirement.



ONE DAY YOU WILL RETIRE



WE WILL ENSURE YOU ARE READY



Securities offered through Capital Investment Group, Inc. Member FINRA & SIPC.



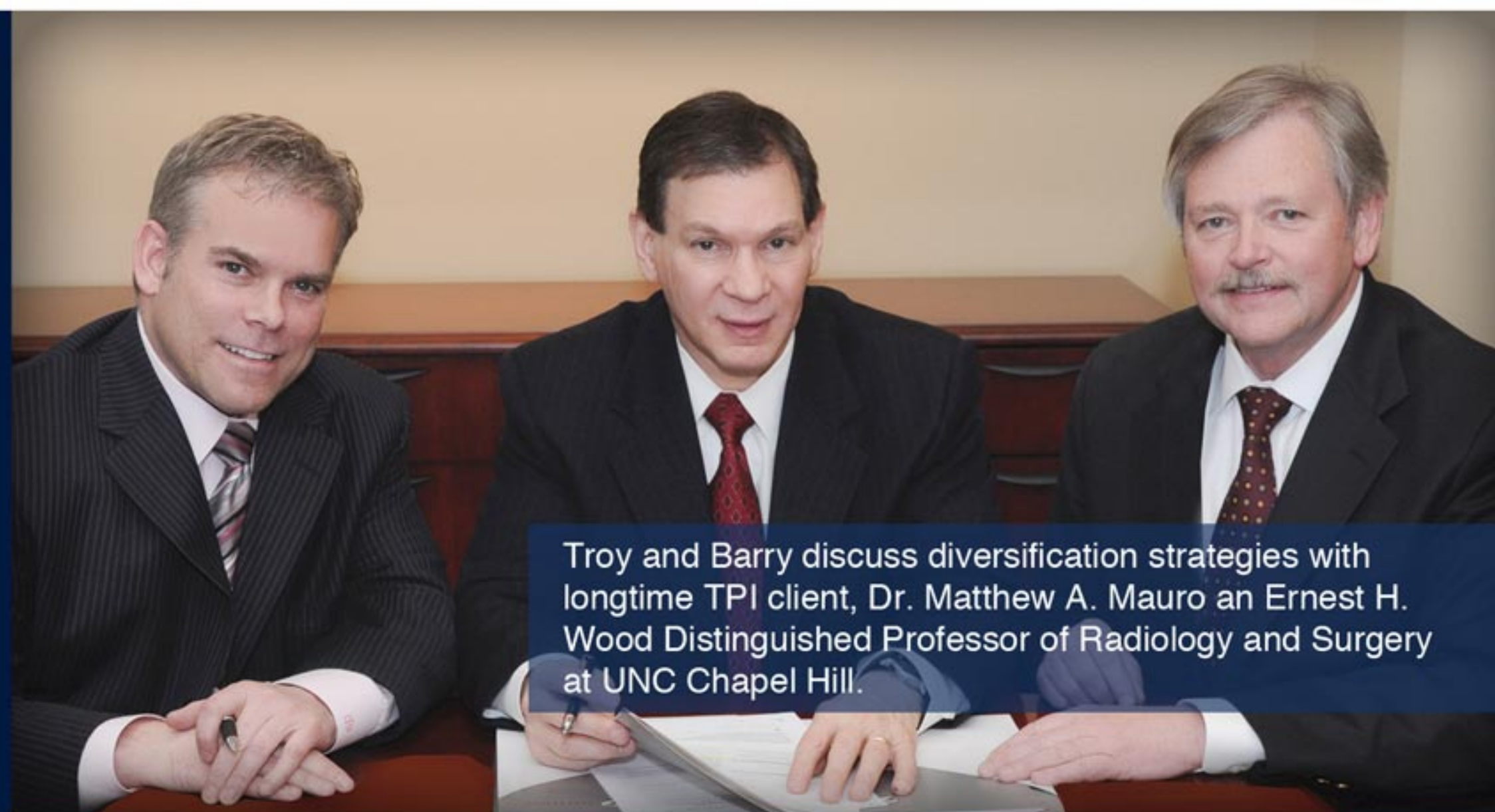
THE TPI TEAM

Tri Pillar Investments, LLC

Tri Pillar Investments' global perspective and exploration of most major sectors greatly diminishes portfolio volatility. TPI will help you create a portfolio commensurate with your individual goals and objectives.

TPI is a Registered Investment Advisory firm headquartered in Durham, NC. Our primary concentration is working with members of the Medical and Academic communities.

We are successfully advising clients at Duke, Wake Forest, UNC Chapel Hill, NC State, NC Central, Moses Cone, Rex Hospital and at institutions in four other States.



Troy and Barry discuss diversification strategies with longtime TPI client, Dr. Matthew A. Mauro an Ernest H. Wood Distinguished Professor of Radiology and Surgery at UNC Chapel Hill.

The TPI Commitment

Our staff consists of experienced professionals who utilize a personalized, hands-on approach to financial guidance. Not only will you find our team members knowledgeable, but you will also discover that our staff truly cares about making your dreams a reality. As your Financial Professionals, we will do everything in our power to help successfully steer you *TO*, *THROUGH* and *BEYOND* retirement.

TPI Investment Philosophy

TPI's Investment Philosophy is built on the foundation of maximal growth with minimal volatility. It is our fundamental belief that by identifying strategic correlations in asset classes, we can greatly reduce volatility. By doing so we enhance the growth potential of our clients' portfolios. This is achieved by combining Traditional, Non-Traditional, and Alternative Investment asset classes.



What's In A Name?

The name "Tri Pillar" originates from two meaningful trilogies. The first represents a holistic view of humanity: **Health, Wealth & Spirit.**

The second outlines our focus on what we believe to be the three primary contributors to a solid financial plan: **Equities, Real Estate and Insurance.**



Troy A. Buder is the *Founder and President* of Tri Pillar Investments, LLC. He has dedicated 15 years of his professional life to the Financial Services industry and launched TPI after successful engagements with First Union/Wachovia, AIG/Valic, and Cornerstone Capital Management. Mr. Buder holds multiple securities and insurance licenses as well as a BS in International Business from United States International University and an MBA from Pfeiffer University. Mr. Buder serves as a committee member with Hockey Ministries International and a wish grantor with Make-A-Wish. Mr. Buder is also the co-founder and co-president of CANDIA Holdings, LLC a local real estate investment company and he has appeared as a featured guest on CNBC's Street Signs with Erin Burnett.



Laurie T. Skwerer serves as TPI's *Chief Investment Officer*. Mrs. Skwerer brings a wealth of professional experience to the position of CIO. Her previous work resume includes management of the endowment fund for Case Western Reserve University as well as working as an analyst for Morel & Co., an Investment Bank based in Wellington, New Zealand. Mrs. Skwerer is a registered Chartered Financial Analyst and holds a master's degree in International Management from the University of Denver.



Barry D. Kendell, DMD, MS is TPI's *Health Care Consultant & Investment Analyst*. Dr. Barry D. Kendell received his pre-dental undergraduate education at the University of Winnipeg and his Doctor of Dental Medicine at the University of Manitoba in Canada. Dr. Kendell served for nine years in the Canadian Armed Forces as a dental officer. He received a Masters in Science and completed an internship and residency in Oral and Maxillofacial Surgery at the University of North Carolina at Chapel Hill. Following his residency he was a partner in a group private practice in Chapel Hill, Durham and Sanford. Dr. Kendell has published several book chapters and articles in his specialty, and is serving as an examiner for the American Board of Oral and Maxillofacial Surgery.



Thomas E. James is a *Senior Investment Advisor*. He comes to Tri Pillar Investments after a successful career in corporate finance. Mr. James has held senior management positions including, VP of Planning and VP of International Mergers & Acquisitions at General Foods, Bristol-Myers Squibb, and Sealy. Mr. James holds Series 6, 63, 65, and 22 licenses and is a CFA candidate. He also holds a BSBA in Finance and Management from the University of Richmond and an MBA in Finance from The Wharton School at the University of Pennsylvania.



Malick Geraldo is an *Executive Assistant* at Tri Pillar Investments. He received an Associate's Degree in Arts from Central Piedmont Community College and is currently a senior studying Finance at UNC's Kenan-Flagler Business School. Upon graduation, Malick will begin working toward obtaining his MBA.

It Takes A Team

We have assembled an efficient and synergistic team of professionals designed to provide all of the essential Financial Services that are important to our clients. Our "one-stop-shop" will help you put all of your financial matters in order and save you valuable time in the process.

