

PROFILE



Frank Foellmer, CFA Executive Vice President & Secretary

Frank Foellmer is Director of Research at Quincy Cass Associates. He has spent the majority of his career as an investment analyst and portfolio advisor to individual investors. He worked briefly in retail merchandising and manufacturing, then quickly focused on the securities industry and financial services.

Frank, a native Californian, is a graduate of the University of California, Los Angeles (UCLA) with a BS in Business Administration. He has an MBA from the Stanford Graduate School of Business.

His Chartered Financial Analyst (CFA) Charter is number 807. He is a past president of the CFA Institute of Los Angeles, formerly known as the Los Angeles Society of Financial Analysts.

Registrations:

FINRA: Series 7 General Securities Representative
 Series 24 General Securities Principal.
 Series 53 Municipal Securities Principal
 Series 55 Equity Trade Limited Representative
 Series 63 Uniform Securities Agent State Law Examination
 Series 65 Registered Investment Advisor
 Series 86 and 87 Research Analyst.

Personal Interests:

One of his outside interests has included participation as an Alumni Yell Leader at the UCLA home football games and has attended every home game for the past 32 years. He enjoys dancing and is a skilled craftsman with woodworking.