



4101 Main Street, Suite C
Hilton Head Island, SC 29926
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Expert Witness: Thomas Nugent: Specializes in Investment Management

- Portfolio Management
- Asset Allocation, Concentration, Diversification
- Prudent Man Rule, Investment Suitability
- Stockbroker, Client Disputes, Securities Trading
- Futures, Options & Commodities
- Mutual Fund Investments & Management
- Management of Trusts and Foundations, Trustee Responsibilities
- Charitable Remainder Trusts & Private Foundations
- ERISA & Retirement Plan Investing
- Professional testimony, deposition and detailed research reports

Professional Experience:

- Senior vice-president of two bank trust investment departments
- Executive vice-president of mutual fund firm and economic consulting firm
- Senior portfolio manager for fixed income and equity mutual funds
- Senior portfolio manager for institutional pension plans
- Instructor at undergraduate and graduate levels in finance, economics & management
- Contributor to resolution of 15 expert witness cases
- Contributing writer for National Review Online
- Contributing writer on an as requested basis for other financial publications

Education:

- B.S. in Education, Seton Hall University
- M.B.A. Rutgers University
- Investment Management Workshop, Stanford University 1976
- Investment Management Workshop, Dartmouth University 1978



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Expert Witness: Joseph Walter Jr.: Specializes in Commercial Banking

- Commercial Lending & Related Business Development
- Bank Mortgages
- Loan Operations
- Credit and Collection Process
- Financial Services
- Loan Portfolio Management
- Loan Relationship Management
- Branch Operations
- Credit Worthiness Evaluation

Professional Experience:

- Bank Senior Vice President and Bucks County Division President
- Bank Senior Vice President and Market Manager
- Bank Vice President and Loan Coordinator
- Bank Vice President, Commercial Lending
- Bank Assistant Vice President, Branch Manager

Education:

- B.S. Business Administration, Delaware Valley College
- Associate Degree, Administrative Accounting, Peirce Junior College