

# MONTCALM

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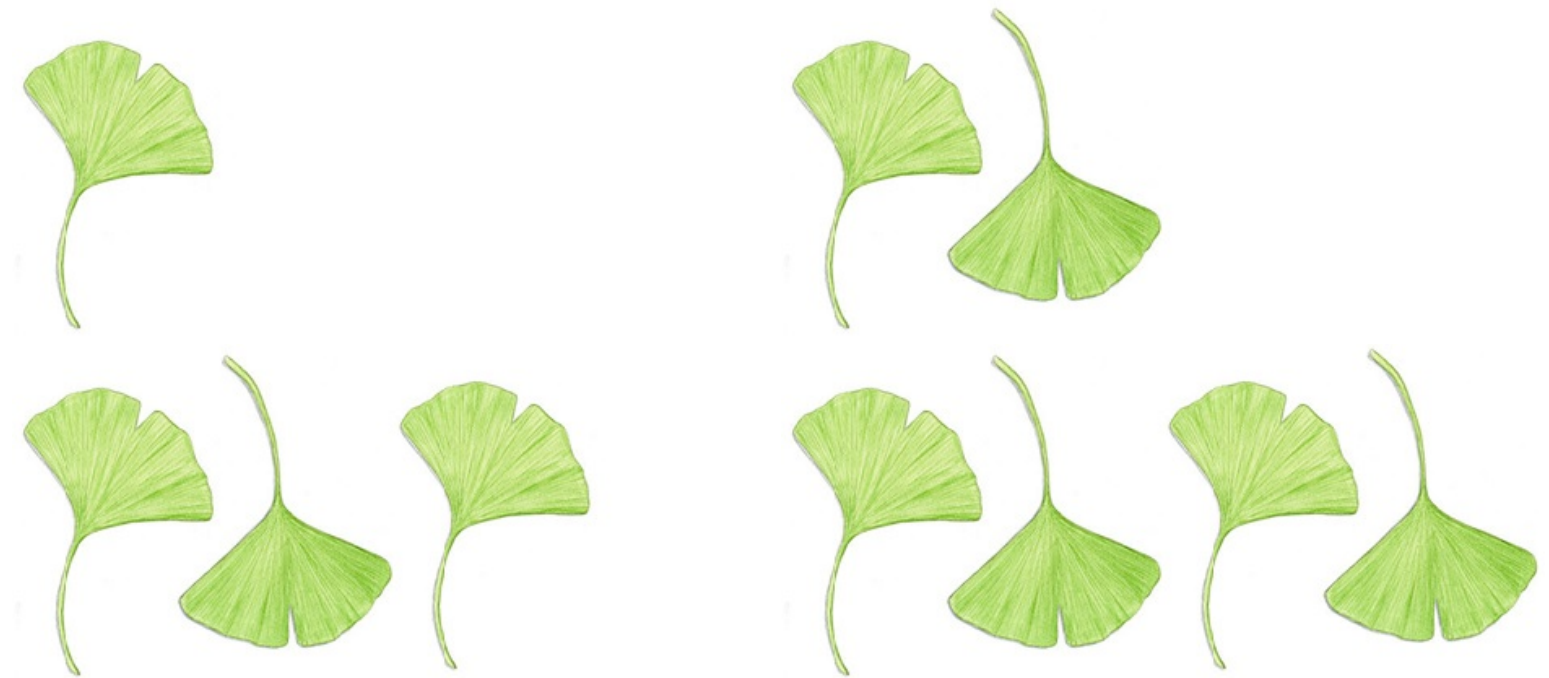
A wealth management firm that blends expert investing with new economy sustainability and independent vision.



Our focus is sustainability through growth, collaboration, and innovative investing—for our clients and for society at large.

## Our Approach

Montcalm is guided by our long-held values: integrity, collaboration, engagement and our client's sustainability.



### **INTEGRITY**

We believe in transparency and trust with our clients and partners.

### **COLLABORATION**

We provide a customized approach for each client, with service that is highly attuned to your needs.

### **ENGAGEMENT**

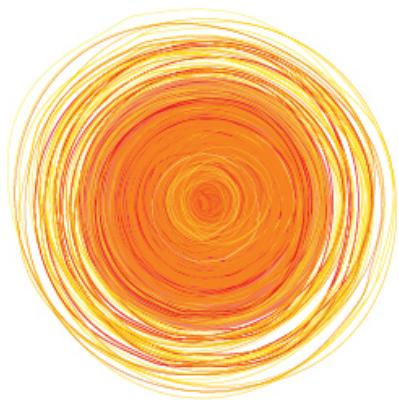
We untie knots in your financial life and work together to develop a clear path to short and long-term wealth goals.

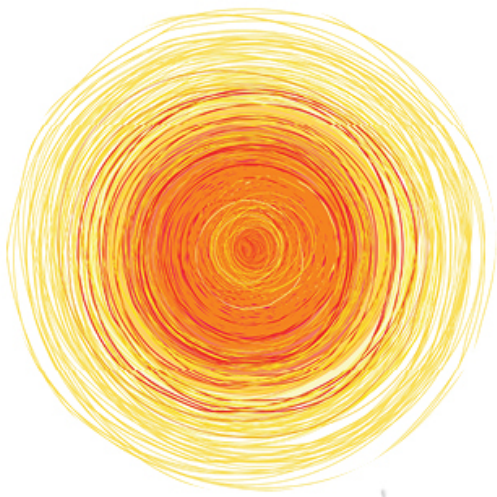
### **CLIENT SUSTAINABILITY**

We create a secure financial future for our clients and care about the broader impact that investing has on the world— economically, environmentally and socially.

We understand risk, reward, and transparency in this new economic landscape, and our expertise helps to protect and grow your wealth.

## Our Services





We invest in companies, asset classes, and investment vehicles that provide superior cash flows and are achieving greatness through innovative products, services and environmental and social practices.

**CLIENT FINANCIAL GOALS**

We are committed to providing expert advice and intelligent risk management that supports your values, needs and goals in the short and long-term.

**CULTURE OF UNDERSTANDING**

Whether we are undoing knots in your financial life or clearly defining a financial plan based on your values and goals, our role as your advisor or consultant is to guide you to the best investment offerings for your needs.

**EXPERTISE**

Decades of investment experience across all asset classes has led to our investment philosophy and innovative approach, which is dedicated to people, engaged in relationships and creates sustainable investment results.

We believe that wise investment opportunities have multiple paths to success and take the long view of influencing future developments as shareholders, bondholders, and stakeholders.

**SUCCESS**

Blending highly attuned personal service, solid values and innovative disruption, we actively seek to enrich the lives of our clients as well as the world around us. The result is a better economic model for everyone. This motivates and inspires us to do our best every day.

**Guiding Investment Principles**

Experience is our foundation

Experience is our foundation

Wise investments have multiple paths to success



Experience is our foundation

Wise investments have multiple paths to success

Honor all perspectives with a 360 view





Experience is our foundation

Wise investments have multiple paths to success

Honor all perspectives with a 360 view

Engagement can elevate the greater good

Certified  
Corporation  
**Best For  
The World**  
2018 **Workers**  
Honoree

Certified  
Corporation  
**Best For  
The World**  
2018 **Customers**  
Honoree

Certified  
Corporation  
**B**  
Corporation

Montcalm is a proud certified B Corporation. B Corporations are a new kind of company that use the power of business to solve social and environmental problems. Learn more about how B Corporations benefit all of us at [bcorporation.net](http://bcorporation.net).





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**HOLLY RUXIN**  
**CEO**

Holly stewards Montcalm, a certified B corp, in the blending of expert investing with new economy sustainability and independent vision. Holly works to guide clients to engage with their wealth by providing services that support their values, needs, and goals in the short and long term, while facilitating a holistic trading flow in impactful investments. For over twenty years, Holly has managed client assets and led private client teams

at Morgan Stanley, Montgomery Securities, and Bank of America. Holly began her investment career at Goldman Sachs in the fixed income derivatives division, where she learned indelible lessons about risk management and cultivated an expert understanding of securities, complex derivatives, and fixed income. Holly uses that extensive experience and expertise to devise customized portfolios for Montcalm's clients, and create financial sustainability within an overall better economic system for all.

#### **ELIZABETH BALDAUF**

##### **ALTERNATIVE INVESTMENTS**

Elizabeth manages the analysis, evaluation, and monitoring of alternative investments for Montcalm TCR. She is at the core of our fund manager due diligence process, and has a keen commitment to high standards of care for clients along with a responsibility to investigate and rigorously pursue information about potential investments. Going beyond traditional

investment performance and strategy analysis, Montcalm qualitatively evaluates the inner workings of an organization and its culture. Prior to Montcalm, Elizabeth spent 12 years in the private equity industry handling investor relations and client services at Morgan Stanley Capital Partners and Thomas Weisel Partners; as well as fund origination, structuring, sales and marketing at Nationsbanc Montgomery Securities and Credit Suisse First Boston.

#### **HOWARD COHEN**

##### **OPERATIONS AND DIRECTION**

Howard Cohen oversees Operations and Direction at Montcalm. He is our energetic fire-tender with an intuitive sense of when to add fuel or when to coax the embers to glow a little warmer. His support of the whole team creates lasting systems and processes, enabling us to continuously improve our high standard of service to our clients.

Howard is a seasoned Executive Producer, artist manager and business development professional with three decades of experience working with clients and professionals in the music and technology industries. He is also a devoted and health-conscious granddad.

#### **KAITLYN ABRAMS**

##### **PORTFOLIO MANAGEMENT**

Kaitlyn fosters the foundational alignment of Montcalm's portfolios with client values and well-being. Integrating portfolio analysis, client engagement, ESG research and due diligence on prospective investments, Kaitlyn connects clients with the powerful financial, social and environmental sustainability created in their portfolios at Montcalm.

Kaitlyn's previous background features work with environmental NGOs, a Master's in English at the University of Maine and a Master's in Environmental Governance at the University of Oxford. She founded *Spire: The Maine Journal of Conservation and Sustainability* and was awarded First Place at the 2018 International Business Ethics Case Competition in Boston. In her free time, Kaitlyn enjoys vegetarian cooking, international travel, exploring the outdoors, and singing and playing the ukulele.

#### **SUZANNE ANDREWS**

##### **CONNECTIONS**

Suzanne's areas of focus at Montcalm are education, communication, and connections. She develops our educational programs for clients and the broader community, to support people in reaching a deeper understanding of their relationship with money and how to invest for their future from a place of positive engagement. Through strategic communications, she articulates our unique services and approach, so that people looking for holistic, transparent, and expert financial services will connect with us.

Previously, Suzanne was a software engineer at Apple and a midwife's assistant, and she is a proud mom. She is passionate about creating opportunities for people to understand and utilize the power of their money. She co-authored the historic first book for women about angel investing, *Impact With Wings*.

#### **JAYNE HILLMAN**

##### **ALIGNMENT**

Jayne is a strategic advisor helping Montcalm meet its highest vision and goals by leveraging the principles of alignment, emotional intelligence, and neuro-science. Jayne is a tuning fork and a navigation advisor to the deep knowing and emotional intelligence of the CEO and the team, helping actualize their integrity and unique contributions.

Jayne has 25 years of business experience supporting the actualization of a vision as it relates to purpose, people, planet, and profit. She is an experienced entrepreneur and executive coach to changemakers and other entrepreneurs, helping them build sustainable, high performing, and radically enjoyable businesses that create a better ecosystem.

## **Events**

MONTCALM

[Women, Purpose & Money Gathering](#)

## In The News

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## Montcalm Insights

MONTCALM

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The actual performance of women tended to more closely match their anticipated performance when they implemented a decision.

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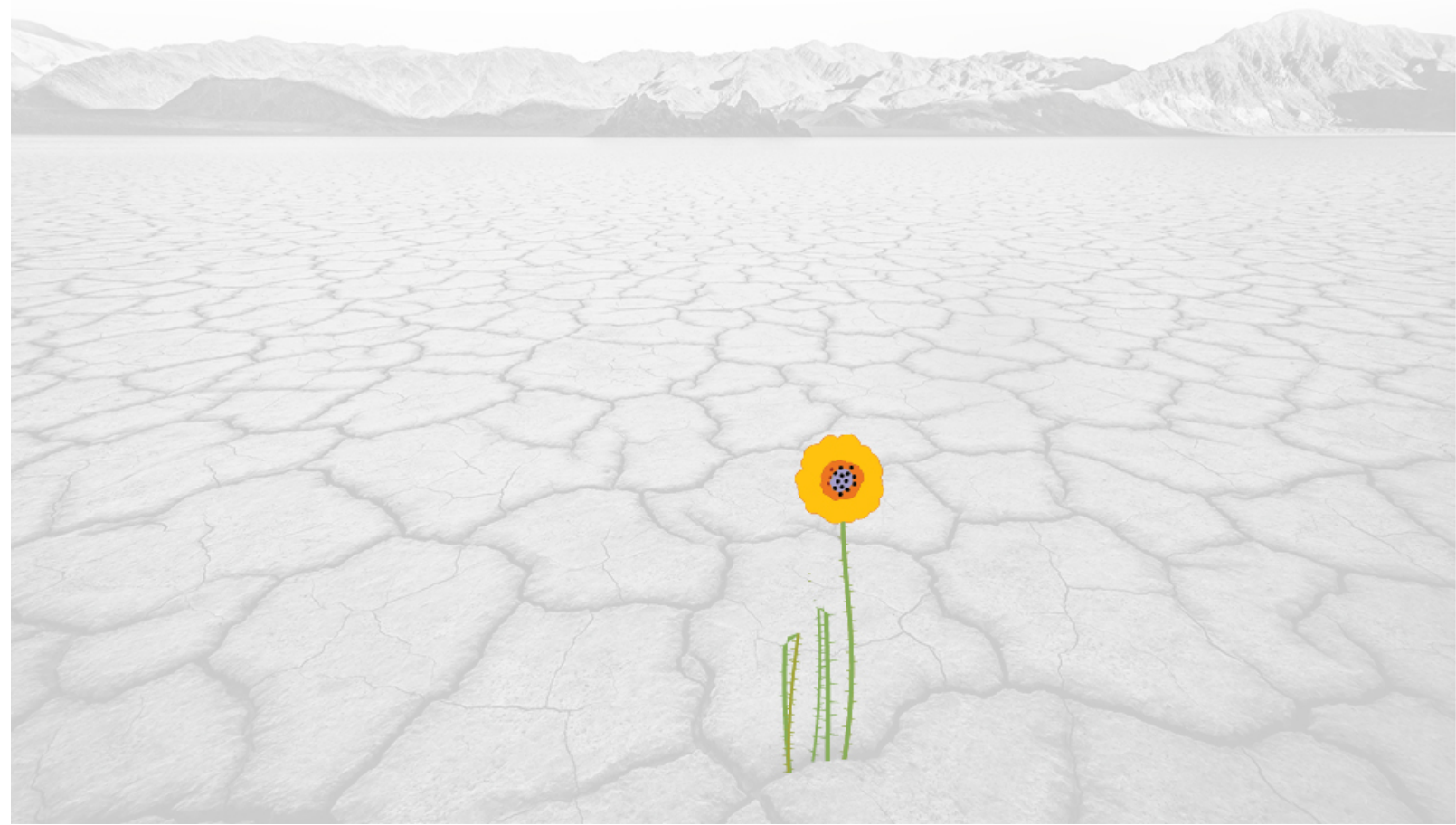
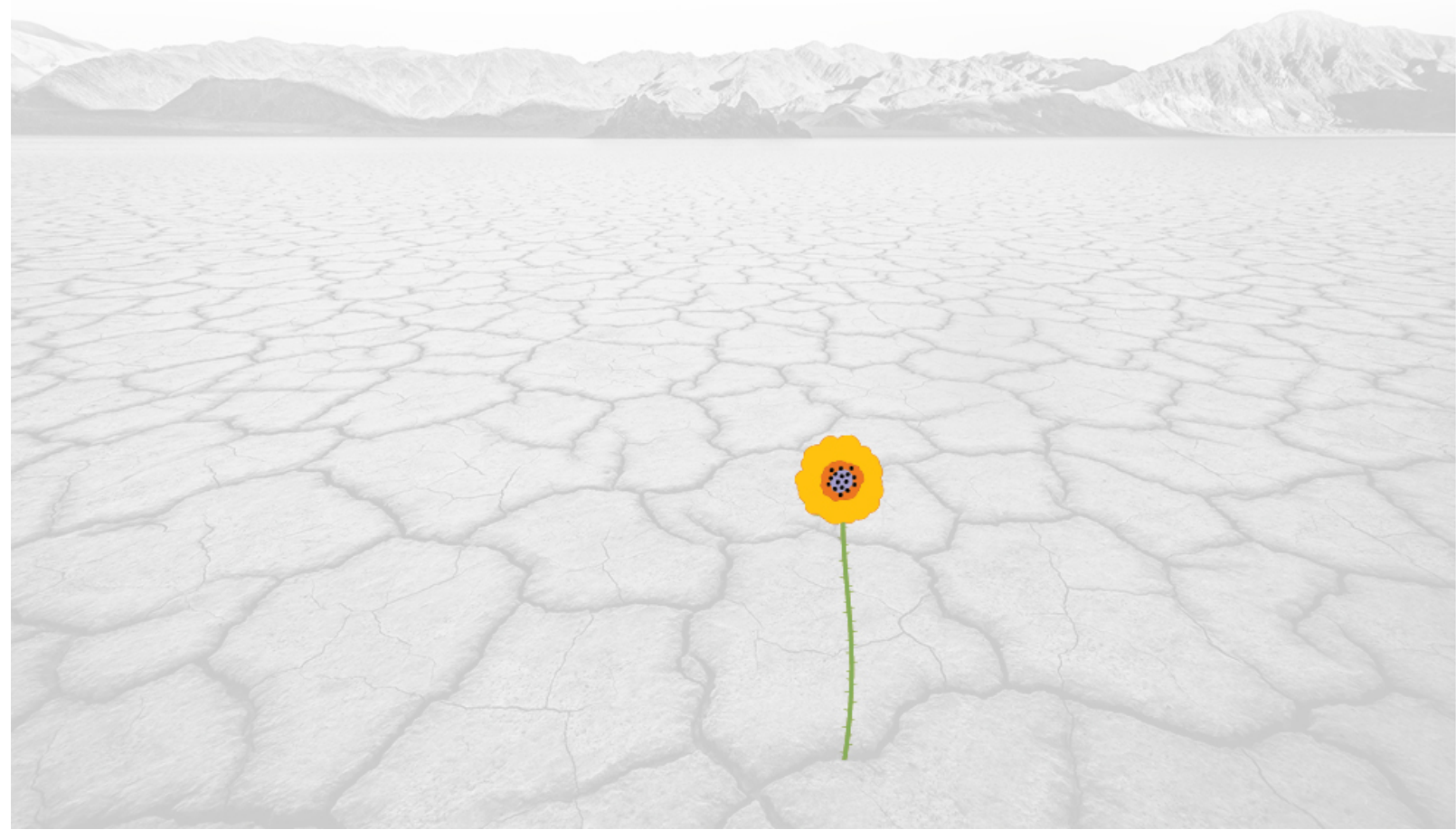
[info@montcalmtr.com](mailto:info@montcalmtr.com)

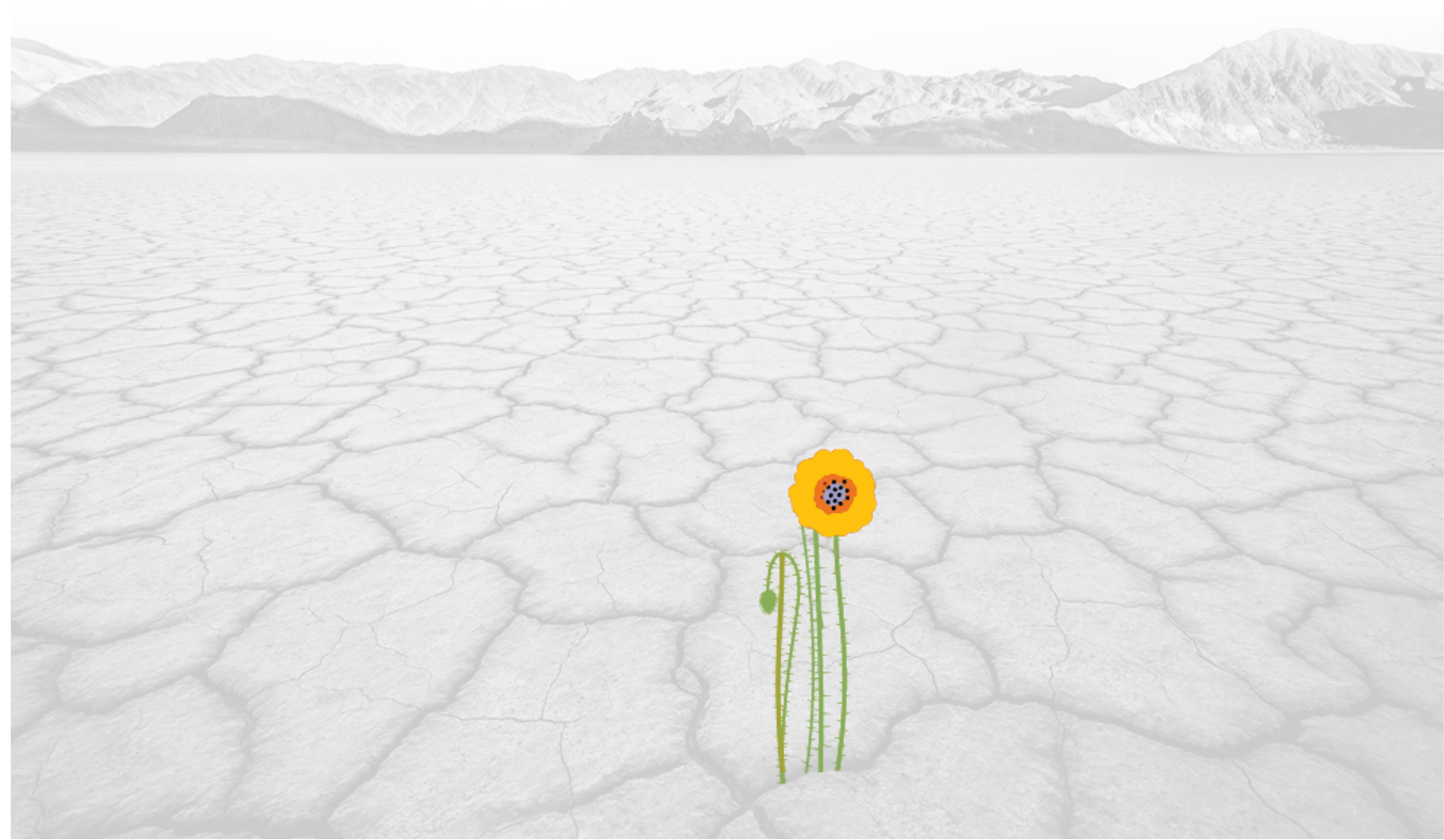


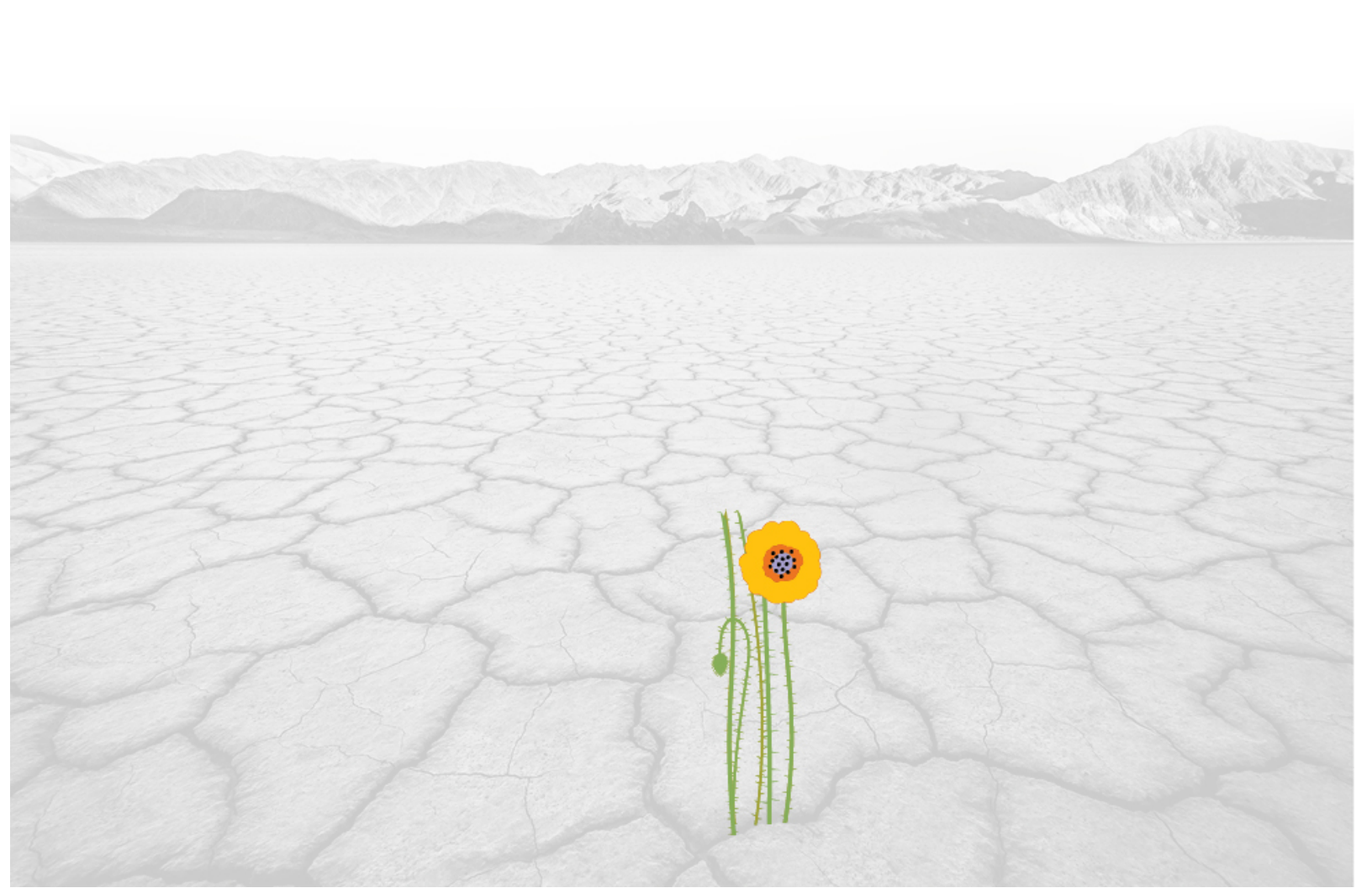
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TCR=TOOLS FOR CARE AND RENEWAL