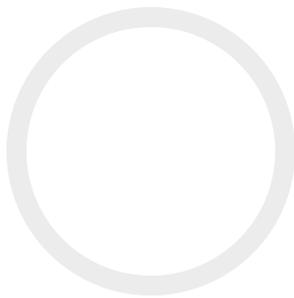


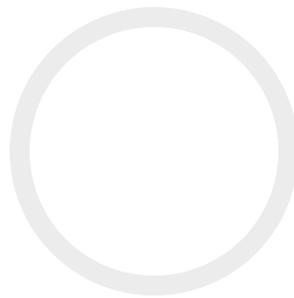
# OUR FOCUS IS PERSONAL, SOPHISTICATED, AND CAREFUL WEALTH MANAGEMENT

## CULLEN, PATTERSON CAPITAL MANAGEMENT, LLC



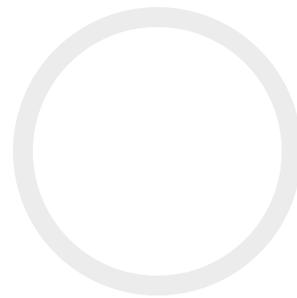
### ABOUT CPCM

CPCM is a California-based independent investment counseling firm founded in 2012. We provide an independent alternative to the large national firms as our business model focuses on specific individualized approach for each client.



### OUR INVESTMENT PHILOSOPHY

CPCM's investment objective is to prioritize preservation of capital while generating superior risk adjusted returns over business and economic cycles. Our strategy identifies investment candidates through a combination of top-down macro-thematic and bottom-up valuation driven processes.



### WHO WE ARE

Rick Cullen and Will Patterson are the two founding partners of CPCM and together have a combined experience of over 60 years in the investment management business.

## ABOUT CPCM



A California-based independent investment counseling firm founded in 2012. Our focus is personal, sophisticated, and careful wealth management. Our investment approach emphasizes the long term preservation of capital while generating superior risk adjusted investment returns over business and economic cycles. Since inception, CPCM has invested in the debt and equity securities of companies, industries, and assets that are inefficiently held or financed, undergoing change, or misunderstood.

We provide an independent alternative to the large national firms as our business model always puts our clients' interests first. We are fully independent investment advisors and we do not have the conflicts of interest that can arise at many other firms. We work purely on a fee basis and do not earn any product related commissions from third parties such as mutual funds, insurance companies or broker-dealers.

CPCM is distinguished by its disciplined value investment approach. We manage discretionary capital for a variety of clients including tax exempt funds for foundations, IRAs, and taxable assets for estates and private investors. CPCM is a registered investment adviser with the United States Securities and Exchange Commission.

## **WHO WE ARE**

Cullen, Patterson Capital Management (CPCM), formed in late 2013, is an investment advisory firm registered with the SEC and provides investment management services primarily for equity portfolios. Current assets under management are over \$120 million. Investment products include a High Dividend Yield portfolio, a Growth and Income portfolio and asset allocation consulting. Rick Cullen and Will Patterson are the two founding partners of CPCM and together have a combined experience of over 60 years in the investment management business.



### **RICK CULLEN**

Rick L. Cullen has over 30 years in the equity and fixed income markets. After serving as the senior portfolio manager at Doctors' Insurance Company, he along with a partner formed the investment management firm Cullen, Fortier Asset Management (CFAM).  
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### **WILL PATTERSON**

William B. Patterson, CFA, has over 30 years of experience in the equity and fixed income markets and has been responsible for the portfolio management of assets of over \$4.2 billion.  
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## **OUR INVESTMENT PHILOSOPHY**

CPCM's investment objective is to prioritize preservation of capital while generating superior risk adjusted returns over business and economic cycles. The firm seeks investments with either contractual cash flows or an identified catalyst, and uses fundamental value and various valuation metrics to project returns over a range of potential scenarios. Our strategy identifies investment candidates through a combination of top-down macro-thematic and bottom-up valuation driven processes.

Many of CPCM's investments are in companies and assets that are affected by change, such as a cyclical downturn, a secular business shift, a liquidity event, a business misstep, major litigation, legislative or regulatory change, or a restructuring.

CPCM invests primarily in marketable debt and equity securities including equities, bonds, convertible bonds, preferred equities, open-end & closed-end mutual funds and Exchange Traded Funds (ETF). Investments emphasize current income, growth of that income as well as growth of principal.

# CONTACT US

For more information about our services, please call 323.851.7308

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Zerif Lite developed by Themelsle