

STEWARDSHIP. EXPERTISE. ACCESS.

Americana Partners is an independent wealth advisory firm working with a select group of families and individuals to help them simplify the management of their substantial wealth. Our clients include patriarchs and matriarchs, executives, business owners, and entrepreneurs, both established and emerging.

Offering financial planning and investment management services, we proactively connect our clients to each other and to people in our personal and professional network. This strategic connectivity creates distinct investment opportunities, including private placements and club deals, where our clients can co-invest with peer-group families, who share similar goals for their lifestyle and legacy aspirations.

FIERCELY INDEPENDENT

Americana Partners is a member of the Dynasty Financial Partners network, one of the industry's pre-eminent advisor platforms. Through Dynasty, we have access to a full array of capital markets and investment banking capabilities, including research, institutional grade technology and analytical tools.

The custodian for our clients' assets is Schwab Advisor Services, whose objective role, along with those of several other key resource partners, gives our team the ability to serve as a true fiduciary.

TEAM APPROACH

With offices in Dallas, Austin and Houston, Americana Partners is run by a team of experienced portfolio managers and investment advisors, with over 100 years of experience in wealth management.

Jason Fertitta

President / Partner



Jason is currently President / Partner of Americana Partners. Jason was a Managing Director in Morgan Stanley's Private Wealth Division for eleven years. He joined Morgan Stanley in 2008 after six years with Lehman Brothers High Net Worth Division. Prior to joining Lehman Brothers, Jason worked six years for Texas Direct. Jason serves on the Board of The Good Samaritan Foundation and Endowment and the Houston Museum of Natural Science. Jason attended St. Edwards University in Austin.

Billy Busch

Senior Managing Director / Partner



Billy is currently Senior Managing Director / Partner for Americana Partners. Billy was an Executive Director of Morgan Stanley's Private Wealth Division. He joined Morgan Stanley in 2009 after several years with UBS and Merrill Lynch. Billy graduated

from Texas A&M University and holds the Accredited Investment Fiduciary (AIF) designation. He has been active in numerous charitable and civic organizations including the boards of Austin Chamber of Commerce and Abilene Christian University.

Billy currently serves as Vice Chairman of the Texas Sport Hall of Fame. He is also a member of the CEO Forum.

Robert Wellington

CFO / Partner



Robert is currently CFO / Partner of Americana Partners. Robert was a Senior Vice President Private Wealth Advisor in Morgan Stanley's Private Wealth Division for eleven years. He joined Morgan Stanley in 2008 as an analyst, also in the Private Wealth Group. Robert holds a B.B.A. in Sociology with a certificate in Markets and Management from Duke University. He also was a four-year letter winner for the Duke Men's

Lacrosse team, which had three Final Four appearances during that time.

Sheldon Busch, CFP®

Managing Director / Partner



Sheldon is currently a Managing Director / Partner of Americana Partners. Sheldon was a Vice President Financial Advisor with Morgan Stanley since 2009. Prior to that, he worked with a regional planning and research team at UBS through the Financial Advisor Associate Program. Sheldon is a board member of the Young Men's Business League of Austin. He received a B.A. in Business Administration from Abilene Christian University and currently holds a Certified Financial Planner™ Designation.

Josh Caltrider, CIMA®

Managing Director / Partner



Josh is currently a Managing Director / Partner of Americana Partners. Josh was a Vice President Financial Advisor with Morgan Stanley since 2012. He focuses on providing customized wealth management solutions to both high-net-worth clients and foundations with an emphasis on capital preservation and risk adjusted returns. In addition, he is committed to managing his client's wealth so it has a positive impact on their life and the lives of generations to come.

Originally from Dallas, Josh graduated with honors from The Cox School of Business at Southern Methodist University and was the recipient of the Outstanding Financial Consulting Major award. Josh also attended the University of Pennsylvania, Wharton School of Business, where he earned the designation of Certified Investment Management Analyst® (CIMA®). Prior to his academic achievements Josh has 10 years of entrepreneurial and management experience in areas that include business strategy, operations,

business process redesign and franchise development within the transportation industry.

Josh resides in Dallas with his wife Emily. He is an avid cyclist and member of Park Cities Baptist Church.

TEAM

Melissa Giles, CFP®

Associate VP / Portfolio Manager



Melissa is currently an Associate VP / Portfolio Manager with Americana Partners. Melissa was most recently an analyst in Morgan Stanley's Private Wealth Division and joined Morgan Stanley in 2011. She was a Business Service Manager for the Central Texas Complex servicing Austin and the surrounding offices. Prior to working with Morgan Stanley, she worked for

several years with Northwestern Mutual. She graduated Magna Cum Laude from the University of Missouri Columbia with a B.S. in Business Administration and currently holds a Certified Financial Planner™ Designation.

Fatina Benjamin

Associate VP / Relationship Specialist



Fatina is currently a Relationship Specialist with Americana Partners. Prior to joining Americana Partners, Fatina was a Wealth Management Associate with Morgan Stanley's Private Wealth Division since 2008. She has held various associate roles with Lehman Brothers, Vaughan Nelson, and Neuberger Berman over her 18 year career in the financial services field. Originally from New York, Fatina attended St. John's University and received a B.S. in Interdisciplinary Studies from the University of Houston. Fatina lives in Houston with her husband, Kirk and daughter, McKenzie.

Shannon Griffin

Associate VP / Relationship Specialist



Shannon is currently a Relationship Specialist with Americana Partners, and most recently, was a Senior Wealth Management Associate with Morgan Stanley's Private Wealth Management division since 2008. Shannon has 25 years professional experience in financial services and prior to joining Morgan Stanley, she was with Lehman Brothers, which she joined in 2003. Shannon is a native Houstonian and attended the American University of Paris and University of Houston, and lives in Houston with her husband, Bill.

Laura Hicks

Associate / Relationship Specialist

Laura is currently a Relationship Specialist with Americana



Partners. Laura was a Senior Client Service Associate with Morgan Stanley Private Wealth Management since 2013. She received a B.S. in Business Administration with a concentration in Financial Management from California Polytechnic State University in San Luis Obispo, CA. Laura holds FINRA Series 7, 66, 9/10 licenses.

Benjamin Athens

Private Wealth Advisor



Benjamin Athens is currently a Private Wealth Advisor with Americana Partners. Prior to joining Americana, Ben was an analyst in Morgan Stanley's Private Wealth division for five years. He earned BBAs in Business Honors and Marketing from the University of Texas at Austin.

Johnathan Schnitzer

Private Wealth Advisor



Johnathan Schnitzer is currently a Private Wealth Advisor with Americana Partners. Prior to joining Americana, Johnathan was a financial advisor associate at Morgan Stanley's Private Wealth Management division for 2 years. He played professional golf for 4 years on the Latin American PGA Tour and won a national championship with the University of Texas before entering the financial industry. He earned a B.S. in corporate communications from the University of Texas at Austin.

CONTACT

Serving as confidante and advocate, Americana Partners focuses on listening to best understand your challenges and aspirations, leading to value-added solutions, strategies, and connections. We look forward to hearing from you.



919 Congress Ave
Suite 1145
Austin, Texas 78701
512.213.2020

811 Louisiana Street
Suite 2420
Houston, Texas 77002
713.429.5552

Dallas
214.774.2246

contact@americanapartners.com