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REGIS
MANAGEMENT COMPANY

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Independent portfolio management and investment advisory for private clients, foundations and endowments.

ABOUT

Founded in 2000, Regis is a multi-billion dollar portfolio manager and investment adviser that builds customized portfolios designed to deliver superior long-term capital appreciation. Regis is an independent investment office with expertise in marketable securities, alternative investments and private investments.

We define and execute wealth and investment management strategies that carefully align with the complex multi-generational goals and needs of each client.

We take a consultative approach and deliver world-class client service, while serving as a trusted advisor across intermediaries and service providers.

INVESTMENT SERVICES

OBJECTIVE, ALIGNED PERSPECTIVE

As an independent advisor, we can be objective in our advice and transparent in our fees and services. We have the flexibility and freedom to choose from a broad global selection of high-quality investments based on your objectives. We are 100 percent employee-owned and invest alongside our clients, aligning our interests with yours.

FULL-SERVICE ASSET MANAGEMENT

For private clients looking for complete asset management, we construct, implement, and oversee all aspects of their portfolio. Regis takes a long-term, valuation-based approach to investing, focused on preservation of capital and reduction of risk. Our conservative perspective allows for both steady growth and needed liquidity to help ensure financial security and peace of mind.

COORDINATED TAX EFFICIENCY

With a focus on capital preservation, we pay close attention to tax implications when designing private client portfolios. We partner with our clients' tax, estate planning, and legal advisors, holding regular all-hands meetings to help ensure investment decisions are well-integrated with tax and estate planning strategies.

EXPERIENCED STEWARD OF CHARITABLE ASSETS

Regis works with private and family foundations in developing and managing their asset management strategies. Volatility and complexity in the capital markets often make it difficult for foundation investment committees to meet their fiduciary obligations while working on a part-time basis. Day-to-day portfolio oversight is essential to help ensure that portfolio goals are being met and capital is preserved.

EXCLUSIVE ACCESS

For Regis' principals and their families, we have combined our best ideas in asset allocation, fund selection and portfolio management experience in a diversified, transparent "all-weather" portfolio. By consolidating our expertise, we have endeavored to create a portfolio with attractive risk and return characteristics, as well as lower investment requirements. We subsequently invited a select and like-minded group of investors to participate in this opportunity, although Regis employees remain the primary participants.

TEAM

Robert Burlinson

MANAGING PARTNER & CHIEF INVESTMENT OFFICER

Robert Burlinson is a Managing Partner, Co-Founder, Chief Investment Officer and member of the Investment Committee. Mr. Burlinson also serves as the firm's Chief Executive and Chief Investment Officer. He previously worked as a Principal for Industrial Growth Partners, a private equity firm focused on middle-market manufacturing businesses. Mr. Burlinson also executed public and private financings and merger advisory assignments for Alex Brown & Sons, Inc. and Kidder, Peabody & Co. He began his career in the private placements group of Manufacturers Hanover Securities Corporation. Mr. Burlinson received an A.B. from Stanford University and an M.B.A. from the Wharton School at the University of Pennsylvania. Mr. Burlinson also serves on the investment committee of the Skoll Foundation.

Peter Gifford

PARTNER & PRESIDENT

Peter Gifford is a Partner and member of the Investment Committee. Mr. Gifford also serves as the firm's President. Prior to joining Regis in 2006, Mr. Gifford worked at Advanced Technology Ventures, a multi-stage venture capital firm. Previously, he worked in business development at Loudcloud/Opsware and in the investment banking and investment management divisions of Morgan Stanley & Co. Mr. Gifford holds an A.B., with distinction, from Stanford University and an M.B.A. from the Stanford Graduate School of Business. Mr. Gifford is currently a Board Member and the nominating committee Chair of the Palo Alto Community Fund (PACF). He has previously served as both Board President and Chair of the PACF investment committee. He also serves on the Board of Governors of The Hotchkiss School and the Advisory Board of the East Palo Alto Charter School.

Stephen Donahue

PARTNER

Stephen Donahue is a Partner and a member of the Investment Committee. Prior to joining Regis in 2004, he served as an Analyst at Bay Partners, an early-stage technology venture capital firm, focusing on enterprise and infrastructure software companies. Earlier in his career, he worked in investment banking at Banc of America Securities and at Kana Software. Mr. Donahue earned an A.B. in Economics and History from Dartmouth College. He has earned the Chartered Financial Analyst designation.

Steven Go

PARTNER & COO

Steven Go is a Partner and Chief Operating Officer of Regis. Mr. Go is responsible for all of the business operations and general day-to-day office activities of the firm including back-office operations, information technology, compliance and other non-investment related activities. Prior to joining Regis in 2010, for three years Mr. Go was the Chief Financial Officer of Black Ship Capital Management, LP, a start-up hedge fund manager and before that, Chief Administrative Officer of Seneca Capital Management, LP where he was responsible for all back-office activities as well as information technology. Mr. Go earned a B.A. in Economics from the University of California, Berkeley and received his M.B.A. from the Stern School of Business at New York University.

Matthew Krensky

PARTNER

Matthew Krensky is a Partner and a member of the Investment Committee. Prior to joining Regis in 2011, Mr. Krensky was responsible for constructing and implementing investment portfolio, wealth and estate planning strategies for ultra high net worth families, foundations and endowments at JPMorgan Private Bank. Mr. Krensky earned an A.B. in Economics from Stanford University.

Kristof Neukermans

PARTNER

Kristof Neukermans is a Partner and a member of the Investment Committee. Prior to Regis in 2006, he conducted healthcare economics research at Stanford University and Cornell University and has published articles in several journals including the New England Journal of Medicine and Emerging Infectious Diseases. Earlier he worked in engineering and prototyping at Xros, a telecommunications company acquired by Nortel. Mr. Neukermans earned a BA in molecular biology from Princeton University and received an MBA from the Stanford Graduate School of Business.

Michael Ross

STRATEGIC PARTNER

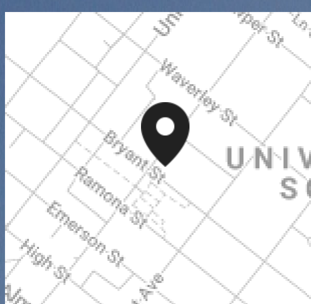
Michael Ross is a Strategic Partner. In addition, Mr. Ross is the Director of MLR Properties and has partnered with Regis to identify distressed real estate opportunities. Mr. Ross was a founder of Makena Capital Management and was its Chief Investment Officer from its founding until April 2010; serving as Senior Advisor to the firm until April 2012. Makena Capital manages a single pooled private endowment fund with approximately $15 Billion in assets under management. Prior to forming Makena Capital, Mr. Ross was the Chief Investment Officer at the Stanford Management Company which is responsible for Stanford University's $20 Billion in financial assets. Mr. Ross joined SMC in 2001 becoming Chief Investment Officer in early 2002. Mr. Ross received an B.A. from Princeton University and an M.B.A. from the Stanford Graduate School of Business where he was an Arjay Miller Scholar. Mr. Ross has served as a trustee and Chairman of the Stanford Graduate School of Business Trust and also sits on the Investment Task Force at the Crystal Springs Uplands School. Mr. Ross is on the Board of Advisors of Atrium Capital Corporation and was previously on the Board of Directors of the Capital Guardian Emerging Markets Growth Fund.

PHONE

(650) 838-1030

LOCATIONS

300 Hamilton Avenue,
Suite 400
Palo Alto, CA 94301



100 Pine Street, Suite 2125
San Francisco, CA 94111

Name *

First Name

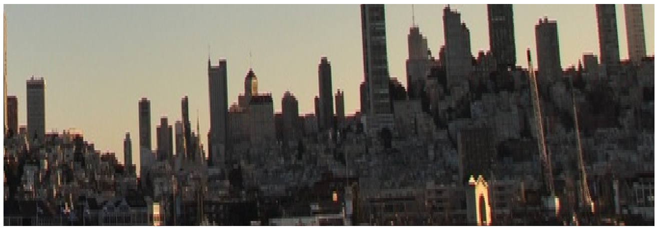
Last Name

Email Address *

Subject *

Message *

SUBMIT



DISCLOSURES (/DISCLOSURES)