



Client Focused Fixed Income Investment Management

Samson Capital Advisors LLC is a global fixed income investment management boutique for affluent families and their foundations, endowments and corporations. Our mission is to provide our clients the highest quality customized service and performance. Our culture emphasizes integrity, teamwork, excellence and innovation in all that we do in order to achieve these goals.

Founded in June 2004

Over \$7 billion in assets under management

Samson's Approach

Separately Managed Accounts

- Each portfolio is designed according to individual client objectives
- Portfolio bonds are owned by the client and held by an independent custodian
- Access to wide dealer network enhances our ability to execute purchases and sales for our clients

Credit Research Emphasis

- Municipal credit process based on fundamental research
- Underlying credits are thoroughly analyzed
- All credits are approved prior to purchase
- In tune with new developments in the credit markets
- Provide topical pieces on municipal market and credit research

Transparency

- Online reporting
- Clients have daily access to portfolio holdings and transactions
- We work with over 30 different custodian banks
- In-house, seasoned operations team
- Investment team regularly communicates with clients regarding portfolio, market updates, and strategy

Preservation of Capital Mandate

- Focus on high quality, liquid bonds
- Actively manage interest rate, credit, and reinvestment risk
- Individually tailor portfolios for liquidity and cash flow needs

After-tax Total Return Orientation

- We search for value across investment grade fixed income sectors
- Quantitative analysis driven by in-house tools
- Broadly invested in fixed income analytic infrastructure



Samson's Investment Strategies

Fixed Income for Individuals

Samson structures high quality and liquid portfolios tailored to each client's tax bracket, state of residence, risk tolerance and income needs. While municipals are the core of our tax-efficient strategies, we evaluate all high grade fixed income sectors on an after-tax basis.

Fixed Income for Foundations, Endowments, and Corporations

For our small to intermediate size institutional clients, we manage separate accounts with a conservative and active approach that emphasizes high quality and liquid securities.

Innovative Fixed Income Solutions

Samson has structured strategies to be responsive to clients' concerns about a declining dollar and future higher inflation.

Samson's clients and their advisors interact directly with the firm's portfolio managers and principals.

Our objective is to know our clients well and to design strategies based on their unique risk/return and investment requirements.

Samson offers analysis of existing portfolios for prospective clients. Please contact us at sca@samsonca.com or (212) 300-1600 to see how we can help you realize your investment goals.

Samson's Team

Principals and other investment professionals are senior members of the fixed income investment industry with an average of three decades of experience.

Portfolio Management, Credit and Trading

Joseph Abraham, CFA*
Carolyn Dolan, CFA*
Jack Haldeman, CFA*
Iraj Kani, PhD
Ryan Kearney
Jonathan Lewis*
Brian Meaney, CFA
Kenneth Potts
Stephen Stowe, CFA
Judy Wesalo Temel*
Benjamin Thompson*
Dexter Torres, CFA
Cristin Wagner

Marketing

Scott Einhorn, CFA*
Nelly Xavier
Matthew Kuss
Radiance Chapman, CFA

Operations

Maria Carlson*

Compliance and Control

Mary Walsh, CPA

Non-Operating Principals

Roy Zuckerberg, Non-Executive Chairman*
Nils Brous*
Dan Stanton*
Andrew White*

*Principal

At Samson, our professionals have a rich variety of backgrounds and experience, stemming from successful careers at premier firms. We work with our clients to find the right Portfolio Manager for their needs. Our clients have direct access to the professionals managing their portfolios.

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