

# Stoker Ostler

## Michael Halls is a Chief Financial Officer and a Senior Portfolio Manager at Stoker Ostler.

Stoker Ostler is a wealth advisory firm serving more than 700 individuals and families, across the United States and internationally, overseeing more than \$1 billion in assets under management.

Michael is a member of the Stoker Ostler executive committee, together with Michelle Decker and Mike Bolar, guiding the long and short-term direction of the firm. Additionally, Michael directly oversees Stoker Ostler's Salt Lake City office. He works closely with clients to identify individual financial goals and develop a portfolio strategy that will help achieve those goals. Michael offers a depth of experience in financial planning and money management, with sensitivity to income and liquidity needs, tax consequences and risk tolerance for clients. Michael is a member of the Stoker Ostler investment committee, which sets investment policies and portfolio strategies. He has also served on several BMO Private Bank investment committees, among them, the asset allocation committee, which guides the investment strategy for BMO Private Bank portfolio managers and the open architecture review committee, which selects and reviews the investment tools available to the BMO Private Bank portfolio managers.

Michael joined Stoker Ostler in 2000 after spending several years as an analyst and manager in the financial services industry.

Michael is a CFA® charterholder and a CERTIFIED FINANCIAL PLANNER™ professional, as well as a current member of the CFA Institute. He earned his MBA from Arizona State University, W.P. Carey School of Business. Michael received his Bachelor of Finance degree from Brigham Young University.

Michael enjoys being active and participating in many outdoor activities, including golfing, camping, hiking, fishing, hunting, softball, tennis, water skiing and boating. He is also a voracious reader and devotes a great deal of time to his church.

Stoker Ostler helps affluent individuals and families reach their financial goals through:

- Financial Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Portfolio Management

Stoker Ostler is a member of BMO Financial Group [NYSE, TSX: BMO], one of the largest diversified financial service providers in North America.



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