

MORRILL & ASSOCIATES PC

James A. Casselberry

Mr. Casselberry is a Financial Industries Consultant for Morrill & Associates.

Over the past three decades, Casselberry has built a reputation as a nationally respected expert in the investment management and investment consulting industry. For several years he has headed **Alternative Asset Advisor Group, LLC**, a firm that offers strategic consulting for investment management and financial services firms. Among the clients he has served are some of the leading banking and capital management firms in the Midwest. Recently he founded **Dearborn Park Group, LLC**, a venture capital firm.

Previously, Casselberry was a **principal at Ennis Knupp and Associates**, where he served as the primary consultant and managed consulting assignments for a number of Ennis Knupp's retainer and project clients. Casselberry served as leader of EnnisKnupp's Emerging Manager Advisory Council and was a member of the firm's global equity research group, private equity research group, as well as the fixed income advisory council.

Some of Casselberry's achievements include:

- Co-managed the continuing asset allocation structure and strategic plan for a large foundation;
- **Authored research papers** on the role of private equity funds for institutional investors;
- Established and revised **investment policy** for several large public and private agencies; and
- Responsible for setting all investment strategy and allocation for an investment capital management firm **managing more than \$1 billion in assets.**

Prior to joining EnnisKnupp in 2004, Casselberry was the Chairman and Chief Executive Officer for **Trias Capital Management**. He served as the Chief Operating Officer for **Wedgewood Capital Management, Inc.** and as a director at the **John D. and Catherine T. MacArthur Foundation** in the investment group. Earlier, Casselberry held positions at **First Chicago** and, before that, at **Arthur D. Little Valuations**.

Casselberry holds a B.S. degree in economics from the University of Illinois at Chicago and an M.B.A. degree from the University of Chicago. Casselberry resides in Chicago, Illinois.



Founder, Dearborn Park Group, LLC;
Principal, Alternative Asset Advisor Group, LLC;
Former principal, Ennis Knupp and Associates;
Former COO, Wedgewood Capital Management; and
Former director at John D. and Catherine T. MacArthur Foundation.