

PORTFOLIO MANAGER PROFILE



AVENTINE
ASSET MANAGEMENT

JIM POTTOW, MBA, CFA

Partner and Portfolio Manager

Business Valuation & Investment Experience: 25 Years

Funds Managed: Aventine Canadian Equity Fund
Aventine Stable Income Fund



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Aventine is a partner-owned investment firm with a focus on capital preservation and long term growth. Established in 2009, our head office is located in Toronto, Canada.

Jim Pottow is a Partner and Portfolio Manager at Aventine Asset Management ("AAM"), with his primary responsibility being the co-management of the Aventine Canadian Equity fund.

Jim brings over 25 years of experience in analyzing, valuing and running both private and public businesses to the team at AMG. He most recently worked at a Canadian investment manager with close to \$1 billion in assets under management, where he championed a new Canadian Equity fund that combined quantitative and fundamental analysis with high conviction position weights under an actively managed "all cap" investment strategy.

The fund that Jim helped design and launch was ranked by Morningstar in the top 5% of all Canadian Equity Funds over the two and a half years Jim was on the fund's management team. The fund generated a significant amount of outperformance versus the S&P/TSX Composite Index while providing investors with a materially more attractive volatility and downside capture profile.

Jim began his career at Bain & Company where he built discounted cash flow models for valuing private and public companies and conducted strategic analysis of various industries to identify

potential acquisitions for clients. He expanded on this experience by helping run The Becker Milk Company, a publicly traded convenience store company his family controlled. Jim was instrumental in leading the operational turnaround of the company and in the sale of its dairy and store operations to a large competitor, while maintaining ownership of its extensive real estate holdings. Jim subsequently applied his education and experience as co-founder of a boutique private equity partnership, as Senior Vice President for Marsh Canada, and working in the private equity arm of Quilvest SA, where he evaluated acquisition opportunities across Canada.

Jim is a CFA Charterholder and a member of the Toronto CFA society. He holds a B. Comm from Queen's University and an MBA from Harvard Business School. Among his various volunteer initiatives, Jim spent six years on Upper Canada College's Association Council where he chaired the Awards Committee. Jim has three children including a nine year old daughter with his wife Alison. Both Jim and Alison are active supporters of several Canadian charities, including the Canadian Foundation for Aids Research, where Alison served as a Director of the Board for many years and as National Director of Development.

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