



Mark Schon CIMA[®], CIMC[®]

Managing Director

Having spent more than 25 years in the financial industry, Mark Schon brings a deep working knowledge of investment product alternatives and strategies to his role as Managing Director. Mark aims to be a trusted advocate and guide for financial advisors seeking separately managed account (SMAs) portfolio services.

Before joining L&S Advisors, Mark was Regional Vice President/Sales Director at Dividend Capital Securities where he marketed a public, non-traded real estate investment trust to the independent broker-dealer community. Prior to that, he spent 13 years as Regional Vice President representing Invesco/AIM mutual funds, SMAs, retirement solutions, and PowerShares ETFs to independent broker-dealers, financial institution advisors, and the New York wirehouse firms. While at Invesco/AIM Funds, Mark raised over \$2 billion in investor capital and was honored with the coveted \$2 Billion Award. He also served as Regional Vice President at Oppenheimer Funds and Textainer Capital Management.

Mark is a member of the Investments & Wealth Institute, having achieved its designations of Certified Investment Management Analyst (CIMA[®]) and Certified Investment Management Consultant (CIMC[®]). He currently holds a Series 65 license and has previously held the Series 7, 66, 22, and 63 licenses.

Mark earned a B.S. in Business Administration with a concentration in Accounting from San Francisco State University. He graduated Magna Cum Laude and was selected "Most Outstanding Accounting Student" of his graduating class.