

PROVIDING A PLAN... FOR LIFE

QUEST CAPITAL MANAGEMENT, INC.
REGISTERED INVESTMENT ADVISOR

At Quest our business is the creation, accumulation, distribution and preservation of our client's wealth.

Each individual client situation is unique, and the Quest staff has been carefully assembled to reflect our varied and diverse clientele. We take great pride in matching our clients with the right financial planning professional, and our team approach ensures that the most appropriate resources at Quest are always available to you

We take wealth management seriously and work hard to earn the industry's highest credentials. At Quest you'll find planners with the following credentials:

- **Certified Financial Planner™ designation**
- **Certified Public Accountant certification**
- **Certified Divorce Financial Analyst**
- **Registered Investment Advisor Agent or Representative**
- **Registered Representative**
- **Certified Fund Specialist**
- **Registered Financial Consultant**
- **Chartered Financial Consultant**

In addition, several of our professionals are licensed through the Texas Department of Insurance to serve as agents for life and disability insurance.

If there's something special you need, please be sure to ask. If someone on our staff doesn't know the answer, we'll find out — fast!

At Quest Capital Management, Inc. we are providing a plan...for life!



E. W. "Woody" Young, CFP®

President

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E. W. "Woody" Young, CFP®, is the co-founder and President of Quest Capital Management, Inc. Woody is a nationally recognized expert in comprehensive financial planning for professionals, business owners, corporate executives, and high income/high net worth individuals with over 20 years of planning experience.

Worth magazine has named Woody one of America's "Best Financial Advisers" four years running, and *Medical Economics* magazine has named him to their list of "150 Best Financial Advisers for Doctors."

In 2003, the Dallas/Fort Worth Financial Planning Association presented Woody with an "Honors Award" for a lifetime of dedication to Financial Planning. He is featured in the book, *Wealth Management Teams: The Smart Investor's Guide to Evaluating and Selecting a Competent Team of Financial Professionals*.

Woody received his B.A. in political science from the University of Oklahoma, and studied business management at Oklahoma City University's Graduate School of Business. As a Marine Corps Officer, he served in the Vietnam War as an artillery battery commander. He subsequently became one of the youngest Majors in the United States Marine Corps Active Reserves.

In 1980, he established E. W. Young & Associates, a firm specializing in business planning, and in 1981, he accepted a position as Vice President and subsequently President of a \$6 million manufacturing company.

Woody brings to Quest clients his winning motivation, his commitment to excellence, and a successful business background.



Viktor Szucs, CFP®

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Viktor Szucs has the unique ability to find simple solutions to complex wealth issues. He helps his clients see beyond their immediate financial concerns to achieve a greater vision of how they can use their financial resources to bring fulfillment to their lives. Viktor specializes in assisting the families of corporate executives and business owners integrate their wealth with their vision of personal achievement. He has extensive experience in working with people in transition, like the suddenly single or recently retired.

Born in Budapest, Hungary, he saw the advantages of capitalism from a young age as family members moved to the U.S. to discover economic prosperity on the other side of the iron curtain. Inspired by his family and driven by his own dreams, he immigrated to the U.S. in 1984.

Viktor graduated from the University of North Texas, with a BBA in Finance with an emphasis on Personal Financial Planning. Viktor has extensive experience in developing customized solutions to balance the risks and opportunities associated with concentrated wealth. He is one of the nation's leading speaker on this and other financial planning topics.

Viktor is also an active leader in the local financial planning community, most recently serving as chairman of the Dallas/Fort Worth Financial Planning Association.

Often named to *D Magazine's* list of "The Best Financial Advisors in Dallas," Viktor is featured in the book, *Wealth Management Teams: The Smart Investor's Guide to Evaluating and Selecting a Competent Team of Financial Professionals*.



Terry Pender, CFP®, CPA

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Terry Pender is Executive Vice President of Quest Capital Management, Inc. and serves clients by providing retirement planning, estate planning, investments, and risk management advisory services.

Terry's experience as a Chief Financial Officer and executive in major corporations uniquely prepares him for the complexities of working with clients who range from corporate executives and business owners to professionals.

Terry earned his BBA in accounting from University of Texas at Arlington and attended graduate courses in business management at the University of Texas Dallas. He is a Certified Public Accountant and member of the American Institute of Certified Public Accountants, and he serves on the Relations of the Professionals Committee of the Dallas Chapter of the Texas State Society of Certified Public Accountants.

Terry is a current member and has served on the Board of Directors of the Dallas/Fort Worth Chapter of the Financial Planning Association. He is a Certified Financial Planner™, a Registered Investment Advisor Agent with the Securities and Exchange Commission and a Registered Representative and principal with Raymond James Financial Services.



Robert Cox, CFP®

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Robert Cox's analytical nature is an asset to his clients. He uses more than 12 years of experience to assist his small business owner clients and physicians establish and maintain wealth. In addition, he uses his expertise to assist clients who are experiencing major life transitions, like marriage, career moves, or the sale of a practice/business.

Regarded as a skilled professional on these topics, he is a frequent speaker and serves as a resource for the local and national media on topics ranging from succession planning for physicians and business owners to blending families and finances. He was named to *D Magazine's* list of "The Best Financial Advisors in Dallas" most recently in 2006.

Rob is a graduate of The University of Oklahoma where he received a Bachelor of Business Administration degree in Finance.

He is a Registered Investment Advisor Agent with the Securities and Exchange Commission and a Registered Representative with Raymond James Financial Services. Rob is also licensed through the Texas Department of Insurance to serve as an agent for life and disability insurance. Rob is an active member of the Financial Planning Association and Dallas Estate Planning Council.



Mary Durie, CFP®

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Mary Durie's goal is to cultivate long-term relationships with her clients. She brings an engaging, straightforward style to explaining complex financial matters and offering diverse options for growing and managing wealth.

Mary has extensive experience in guiding her clients through important financial decisions involving major life transitions. She specializes in working with high net worth and/or high income families; specifically, those with highly concentrated positions in a single stock.

Mary was named to *Robb Report Worth* magazine's prestigious list of "The Nation's 100 Most Exclusive Wealth Advisors". She was named to *D Magazine's* list of "The Best Financial Advisors in Dallas" most recently in 2006. She has been featured, in the book, *Wealth Management Teams: The Smart Investor's Guide to Evaluating and Selecting a Competent Team of Financial Professionals*.

Mary began her career in financial planning after graduating from the University of Oklahoma in 1984, developing hundreds of financial plans for use by planners across the country. She joined Quest Capital Management in 1988 where she has since served as a Senior Financial Planner, earning her credentials as a Certified Financial Planner™ in 1990.

Mary is a Registered Investment Advisor Agent with the Securities and Exchange Commission and a Registered Representative with Raymond James Financial Services. She is also licensed through the Texas Department of Insurance to serve as an agent for life and disability insurance.



**Kalita Beck Blessing,
CFP[®], CFA**

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Kalita Beck Blessing is a principal and Quest's top producing Financial Advisor. She is, in part, responsible for implementing growth strategies for the firm. With over 15 years of experience, Kalita is a leader with integrity in helping families create and preserve their wealth and should they choose, leave a legacy. In addition, she has a specialty in empowering suddenly single women increase their knowledge of their financial, business and philanthropic goals.

Kalita is a Dallas native and graduated from The Hockaday School. In 1981 she received her Bachelor of Arts degree from Dartmouth College in International Policy. She was among the college's first women graduates.

Kalita is active in both professional and civic organizations. She currently serves on the Investment Advisory Committee for the Dallas Women's Foundation, the Board of Trustees of The Hockaday School and the YMCA Foundation.

Kalita Blessing is a Registered Investment Advisor Agent with the Securities and Exchange Commission, a Registered Representative with Raymond James Financial Services, a Certified Financial Planner™ and a Certified Divorce Financial Analyst. Kalita is licensed through the Texas Department of Insurance and many other states where her out-of-state clients may reside.

In 2005, Kalita was named by Robb Report's *Worth* magazine as one of the nation's Top 100 Wealth Advisors. She continues to rank as *D Magazine's* list of "The Best Financial Advisors in Dallas." most recently in 2006. She continues to be listed on *D Magazine's* list of "The Best Financial Advisors in Dallas," most recently in 2006.

"My passion is to help families to create and preserve wealth and leave a legacy."



Jane McGinnis, CFP[®]

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Over the last 25 years Jane has amassed a wealth of knowledge in banking, insurance and investment planning to help her clients make sound financial decisions. Her clients include senior level corporate executives, doctors, lawyers, and entrepreneurs who rely on her to develop a customized plan to assist in preserving, managing and growing their wealth. She stays abreast of trends and important changes in the financial world that impact her clients by attending conferences and meeting with money managers.

Jane is a honors graduate from Riceland College and earned her credentials as a Certified Financial Planner™ in 1984. She joined Quest Capital Management, Inc. in 1997.

Jane currently serves on the Dallas/Fort Worth Financial Planning Association Board as the Director of Corporate Sponsors. Active in the arts, Jane has served on the Dallas Opera Guild Board and the Irving Lyric Stage League. Her boundless energy and outgoing personality have been key to her development of several referral and networking groups, providing additional resources for the benefit of her clients.

Jane McGinnis is a Registered Investment Advisor Agent with the Securities and Exchange Commission and a Registered Representative with Raymond James Financial Services, holding Securities Licenses 7, 63 and 65. Jane is also licensed through the Texas Department of Insurance to serve as an agent for life and disability insurance.



Chris S. Young, CFP®

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Chris Young's analytical nature is an asset to his clients. He specializes in assisting physicians, attorneys, and other professionals create a plan for life. His skills are particularly beneficial to those clients who are experiencing major life transitions, like marriage, job changes, career moves, retirement, or the sale of a professional practice.

Regarded as a skilled professional on these topics, he is a frequent speaker and serves as a resource for the local and national media on topics ranging from succession planning for physicians to blending families and finances. He was named to *D Magazine's* list of "The Best Financial Advisors in Dallas" three consecutive times, most recently in 2006.

Chris is a Cum Laude graduate of The University of Texas at Dallas where he received a Bachelor of Arts degree in American Business and Technology.

He is a Registered Investment Advisor Agent with the Securities and Exchange Commission and a Registered Representative with Raymond James Financial Services. Chris is also licensed through the Texas Department of Insurance to serve as an agent for life and disability insurance. He is a shareholder and a member of the Board of Directors for Quest. Additionally, Chris is an active member for the Dallas/Fort Worth Financial Planning Association, currently serving on the Career Development Committee.

Additionally Chris has served on the Keep Plano Beautiful Commission as well as the board for the local Phi Gamma Delta alumni group.



Carl J. Kunhardt, CFP®, CIMA®

Director of Investment Management and Research

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Carl's experience as a career officer in the United States Marine Corps has contributed to his discipline and thoroughness in providing high net worth clients with strategic solutions for their wealth management needs. He has worked with Quest's largest net worth clients to provide solid financial and investment advice designed to help them achieve their financial objectives.

Carl's unique approach to working with clients and other members of a financial planning team comes from years of leading professional and technical staffs through problem solving to find innovative solutions.

A history buff, Carl is also an avid reader of professional journals and investment, technology and business development publications, which helps him stay abreast of trends and important news that impact his clients. He has completed graduate studies at Troy State University and post-graduate studies at the University of North Texas, the Naval Postgraduate School, and the Marine Corps Command and Staff College.

A shareholder at Quest, Carl is a Certified Financial Planner™ and has also been awarded the Certified Investment Management Analyst, Investment Management Consultant and Certified Fund Specialist designations. He is a Registered Principal with Raymond James Financial Services, holding Series 7, 24, 31, 63, and 65 licenses. Additionally, he is General Lines Insurance licensee for Life, Accident and Health and is registered as a Registered Investment Advisor Agent.



Chandler Ferguson, CFP®

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What Chandler enjoys most about the financial planning profession is building life-long partnerships with clients and assisting them with their planning needs. Chandler passionately believes in letting personal values drive both the goal setting and financial planning process. Chandler enjoys working with young professionals during the wealth accumulation phase, guiding them through life's "little bumps" along the way.

Chandler stays active in the financial planning community through organizations such as the Financial Planning Association and the Estate Planning Counsel of North Texas. He continues to enhance his education, most recently by working to acquire his life, health and disability insurance licenses after earning his credentials as a Certified Financial Planner™. Chandler is a Registered Investment Advisor Agent with the Securities and Exchange Commission and a Registered Representative with Raymond James Financial Services, holding Securities Licenses 7, 63, and 65.

Chandler graduated from the University of North Texas with a BBA in Economics. He remains an active alumnus through his membership in North Texas Exes, and continues to support "Mean Green" football. When Chandler is not watching sports, he enjoys competing. He was recently named the MVP of his league champion softball team.

Chandler and Shauna reside in Colleyville where they take an active part in supporting and volunteering for their city, community, and church.