



Prateek Mehrotra, MBA, CFA, CAIA
Chief Investment Officer

As Chief Investment Officer, Prateek is responsible for sourcing, analyzing, recommending, monitoring, and reporting on both alternative and traditional investments. He manages relationships with high net worth clients, institutional investors, and traditional/alternative (hedge funds, private equity, and real assets) money management firms.

Prior to joining the Firm, Prateek was a principal with GTG Ventures, Inc. in Palo Alto, California where he was responsible for sourcing and analyzing investment opportunities across various technology sectors. He also worked overseas with a boutique investment company and was involved in co-managing a PIPE fund and a hedge fund-of-funds, among other alternative investing activities. He has over 15 years of experience in the financial services industry involved within areas as diverse as sell-side investment banking, leasing portfolio management and buy-side alternative assets investing. Prateek lived and worked in India and the Middle East, and brings a wealth of global experience and perspective to the Firm.

In addition to his Bachelor's Degree in Technology from the Indian Institute of Technology, Kanpur, India, Prateek earned an MBA from Lehigh University in Bethlehem, Pennsylvania and was a Rotary International Scholar while attending Lehigh. He is both a Chartered Financial Analyst (CFA) Charter Holder and a Chartered Alternative Investment Analyst (CAIA). The CAIA program is the global mark of distinction for alternative investments and Prateek has blazed the trail by being the first CAIA Charter Holder in Wisconsin.

Prateek has volunteered to be Chairman of the Sponsorship Committee for IndUS of Fox Valley, a non-profit organization dedicated to promoting Indo-American friendship and goodwill by serving the community through social, cultural, educational, and charitable activities. He and his wife Richa have been volunteers to IndUS since relocating to the Fox Valley, and find the family-oriented lifestyle very invigorating. Prateek also sits on the Board of a local technology company.

Prateek and Richa have two children. Favorite vacations include visiting the National Parks located throughout the United States and Canada, including annual family camping trips.