

Thomas Gordon Parr

Tom focuses on portfolio management and investments to serve our clients' financial plans. He has been with Morgan Stanley since 2006. Prior to that, he started and ran the Pudge Bros. Pizza franchise and worked with Ben & Jerry's ice cream franchising in New Mexico. He is a Portfolio Management Director and a member of the firm's Portfolio Management Group. Tom has spent much of his life in New Mexico, graduating from Albuquerque Academy. He attended the University of Pennsylvania, earning a B.S. in economics from the Wharton School of Business. Tom rowed on the crew team while attending Wharton. Tom is also interested in directly serving family businesses in New Mexico. He currently serves as the President of the Parker Center for Family Business at the University of New Mexico's Anderson School of Management. Tom and his wife, Krista enjoy photography, horses, and adventure travel.



Kayla Kersey is the Chief Administrative Officer on the Executive Coaching Team for Dale Armstrong, owner and founder of TLC Plumbing & Utility. She has been supporting Dale with multiple businesses that provide essential goods and services in New Mexico since 2006. Once she graduated

high school Kayla began work in the family business in the summer before college, she loved it, stuck with it, and hasn't looked back since.

Kayla believes that if you fight for the highest possible good, calibrating high support and high challenge, for people in every circle of influence you create a culture of empowerment and opportunity for those around you.

Kayla has been a part of the creation and implementation of multiple systems across many of Dale's companies including; project manager for the implementation of a new enterprise software system for a 400+ employee company, creating scorecards and information sharing tools throughout the businesses, innovation and recreation of a health plan with 800+ members impacted- including creation of a health clinic for the employees and their families. Most importantly to her is her involvement in mentoring and coaching many leaders to become leaders worth following through the GiANT Leadership tools and program as well as her Myers Briggs Certification.

Kayla has a wonderful husband, Cody, of nearly 10 years and they have two children, JD and Abby. She is raising her family where she grew up- a small town called Magdalena, NM. She was raised on a cattle ranch where she participated in 4H -showing a Grand Champion Lamb at the county fair, as well as receiving multiple academic & athletic awards in Basketball, Volleyball and Track & Field.

John L. Attwood Bio

John recently joined First American Bank in Albuquerque as Vice President, Trust Officer and Business Development.

John has held certification as a Nationally Certified Guardian (NCG) since 2006, which uniquely qualifies him to administer Conservatorships, Special Needs and Personal Injury Settlement Trusts. He has extensive experience working with clients on the disability spectrum, ranging from Developmental Disabilities, TBI, Paraplegia, Quadriplegia, and Mental Illness.

He holds a B.A. from Oklahoma Wesleyan University, and has graduated from American Banker's Association Intermediate and Advanced Trust School.

John has served as President of the NM Alzheimer's Association and NM Guardianship Association. He has served on the board of the UNM Anderson School Foundation and the Parker Center for Family Business, formerly The NM Family Business Alliance. John is also a member of the Albuquerque and Santa Fe Estate Planning Councils.

Currently he advises several non-profits regarding organization sustainability through planned giving. Some of the organizations he works with are ARCA, Albuquerque Public Schools Foundation, Anderson-Abruzzo International Balloon Museum, Colorado and New Mexico Planned Giving Roundtables.

Please contact John via email at jattwood@firstamb.com or call 505-821-9854



Jocelyn Houser Gorman

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Graduating Cum Laude with a degree in International Relations and minor in Business from the University of Denver, Jocelyn was made for the business world. She gained initial experience in Denver, preparing her to move back to Albuquerque. By the end of 2011, she had moved back, developed and strengthened the sales team at DSI, and had fully committed to the family business and its success. Her experience supporting sales teams for all 7 DSI offices reinforced her interpersonal skills and industry knowledge, resulting in her developing major accounts

throughout the state, specializing in education, medical and government. Her innovative perspective inspired her collaboration with their Marketing Director to rebrand DSI through website redesign, social media presence, blogs, and additional fresh ideas to re-engage current partnerships, while building new ones. These experiences strengthened her capacity to help start DSIT in 2015, the managed services sister company, without traditional financing, that is currently over a million-dollar company. Successes like this have built her credibility and ultimately prepared her for her current role of VP of Sales. Jocelyn is committed to being visible throughout DSI and the community; she sits on DSI's Board of Directors and Executive Team, Board of Parker Center for Family Business, and the 1st NexGen Leadership Peer Group, to cultivate widespread impact, and continuously refine systems and structures to best support the DSI family.

Personal Statement:

Two things brought me back to Albuquerque: family and core values. Many shy away from blurring the line between family and work, but I cherish it. This dynamic created an organization that prides itself on prioritizing community, integrity, and accountability. These are the pillars of DSI, ones I am committed to upholding as I work with my father and brother, alongside the rest of the family, to build a legacy where DSI continues to be respected in the community for not only ethical and efficient practices, but also for giving back to the community that supports them. Thomas Watson Sr. stated, "To be successful, you have to have your heart in your business, and your business in your heart." The heart of the Houser family started DSI, and I continue to lead with my own.

Kathy Wiseman is a strategic thought partner, consultant and coach for family members and their advisors who work together in their family enterprise or manage assets together.

Kathy Wiseman's leadership at the Bowen Center for the Study of the Family, The Family Firm Institute, Collaboration for Families Flourishing, George Washington University provided the basis for assisting families with the challenges and possibilities they face working together. Her clients include individuals, family businesses, family foundations, trusts and estates. She assists family members and their professional(s) to make the next right decision for the assets and the relationships.

The foundation of her work is Bowen family systems theory and Zengar Neurofeedback. Based on the latest studies of the human brain and family relationship systems, Wiseman's skill-full guidance promotes effective decision making when the stakes are high, and emotions cloud possible options. Wiseman is a faculty member at the Bowen Center for the Study of the Family formerly the Georgetown University Family Center. She is the founder and president of Working Systems, Inc., a founding member and past president of the Family Firm Institute.

Wiseman is a cofounder of Navigating Systems a course for lawyers, accounts, trust officers and family office executives who want to learn more about family and how families predictably function. Wiseman was in partnership with Charles Collier of Harvard University teaching a course titled Working with Families of Wealth. Ms. Wiseman is on the Leadership council of WAMU the public radio station in Washington DC , and (JCA) The Jewish Council for Aging.

Mitzi M. Montoya, PhD, is the Dean of the Anderson School of Management at the University of New Mexico. Dr. Montoya received her PhD in Marketing and Statistics and BS in Applied Engineering Science, both from Michigan State University.

Dr. Montoya is a thought leader in higher education. Throughout her career she has supported student and faculty success, enhanced entrepreneurial and innovation ecosystems and led collaborative initiatives that advance economic and community prosperity. Prior to joining UNM, Dr. Montoya was the Sara Hart Kimball Dean of the Oregon State University College of Business. She also served at Arizona State University where she was the Dean of the College of Technology & Innovation, Vice Provost of the ASU Polytechnic Campus and inaugural Vice President and University Dean of Entrepreneurship & Innovation for ASU. Dr. Montoya began her career at North Carolina State University where she held the Zelnak Chair in Marketing & Innovation in the Poole College of Management and was Special Assistant to the Vice Chancellor of Research. She is a former American Council on Education (ACE) Fellow.

Dr. Montoya's research focuses on innovation processes and strategies and the role of technology as an enabler of virtual team decision-making. She is widely published and a recipient of numerous grants. She has taught courses in innovation and marketing strategy in the US, England, Brazil, Italy, Egypt, Kuwait, Russia, Japan, Hong Kong, Switzerland, Panama and Argentina.

Dr. Montoya has served on the board of various startup ventures, nonprofit foundations and economic development boards. She advises many organizations on topics related to innovation and marketing strategy. At heart, she is an innovator with a mission to be an agent of change for the greater good.



Krista K Parker

**Cafeteria Plan Company
Vice President**

As vice president of the Cafeteria Plan Company, a third-party-administration family owned firm for employee pre-tax benefits, Krista oversees the daily operation of the firm and was instrumental in establishing the administrative infrastructure of the firm. She spearheads the business development aspect of the company and client administration.

Krista is a seasoned pre-tax benefits specialist with more than 20 years of experience working with a wide range of workplace benefit plans and clients. She is dedicated to assisting clients set up Flexible Spending Accounts (FSA), Health Reimbursement Arrangements (HRA), and Health Savings Accounts (HSA) accounts.

Charles B. Ewing

A native of Santa Fe, Charles B. Ewing earned his BBA, with a finance concentration, from UNM's Anderson School of Management in 1976. Immediately upon graduation, he started his banking career which spanned 40 years. The first 30 years of his career were with community banks focusing on Albuquerque-based businesses that were typically family owned and/or closely held.

In the final ten years of his banking career, Ewing was based in Dallas, Texas, working for Wells Fargo and BBVA Compass Bank. During this period with Wells Fargo, Ewing provided internal consulting to the Business Banking Group, defined as clients with revenues of less than \$30 million (typically family owned and/or closely held). While employed at BBVA Compass Bank, Ewing was a Senior Vice President and Director of Wholesale Portfolio Management and Credit Risk Monitoring. This senior credit administration role supported a wholesale loan portfolio of \$62+ billion to clients having access to capital markets.

Ewing earned his MBA from Southern Methodist University (2010) and has served as an adjunct faculty member with UNM Anderson (2018), the Western States School of Banking (1981-2017), and the American Institute of Banking (1979-1990). He has been active with Rotary (since 1988); was involved with United Way of Central New Mexico (1999-2006) and Neighborhood Housing Services, Inc. (1990 - 2002); and served as President and Board Member of the Samaritan Counseling Center (2001-2007). He resides in Albuquerque with his wife, Kate Livingston, a former Associate Dean/Executive Director with the Anderson School of Management.

Kevin Yearout

Kevin is a native New Mexican who has been very active in the philanthropic community having sat on many boards, funds and foundations. He is a past chair of the Albuquerque community foundation and past President of children's cancer fund of New Mexico and a proud member of the Cinco Amigos, a group of 5 local businessmen who are committed to supporting economic development in underserved communities in New Mexico. Kevin and his wife Lian have owned and operated multiple family businesses in Albuquerque for over 35 years and have been strong supporters of their companies and employees being active in the community. Kevin and Lian and their 4 children, 2 son in laws and 6 grandchildren are all actively involved in the philanthropic community through their family foundation and donor advised funds through the Albuquerque community foundation.

Bio for Natalie Morris

Natalie Morris has over 36 years of Gaming Industry experience, working with Native American casinos, Charity Gaming operations and Central American casinos. She is currently CEO of Matrix Game Technology, a company that provides equipment and operating systems for charitable gaming operations throughout Texas, Alabama and Florida.

Prior to Matrix, Natalie was the CEO of Infinity Group, Inc., which was partly responsible for the original gaming compacts in the state of New Mexico. Infinity Group employed over 150 people in Albuquerque, NM, primarily doing Native American Gaming as well as charitable bingo operations.

After graduating from NMSU, Natalie worked for British American Bingo, which opened what is now Isleta Casino. She took 4 years off from the Gaming industry and worked for Land Commission Bill Humphries during his time in office.

Currently, Matrix Game Technology is expanding into other areas with a new company called Slot Tournament USA, which is focused on fundraising for nonprofit organizations throughout the US and Canada, as well as entertainment for Assisted Living Facilities.

Natalie has been married to Earl Morris for 26 years and together they have 5 children and 1 grandchild.

Robin Dozier Otten

Robin Dozier Otten serves as the executive director of the Parker Center for Family Business at UNM's Anderson School of Management. Otten is President and CEO of RDO Strategic Consultants, LLC, a public-issues consulting firm founded in July 2003 in Albuquerque, New Mexico.

“Working to facilitate the Parker Center’s mission to provide family businesses with opportunities to address their unique needs through outstanding educational programs is exciting to me,” Otten said. “A large percentage of New Mexico’s businesses are family businesses that make a significant contribution to our state’s economy. Helping them deal with the challenges they face will allow them to succeed now and for generations to come.”

Otten’s government experience includes serving as Director of the Department of Family and Community Services at the City of Albuquerque throughout Mayor Richard J. Berry’s first term. She also worked eight years on former New Mexico Governor Gary Johnson’s cabinet, first as Regulation and Licensing Department Superintendent and later as Human Services Department Secretary.

In the private sector, Robin has been in the private practice of law at Otten, Vogel and Campbell, PC, a firm she began in 1987. She also has extensive experience in the non-profit arena, having served as president of Heading Home, vice-president of NM Appleseed, president of the Northern New Mexico Chapter of the National Association of Women Business Owners (NAWBO) and secretary of Goodwill Industries of New Mexico. Otten recently acted as interim executive director at Supportive Housing Coalition of New Mexico.

She is a graduate of the University of New Mexico with a B.A. in government and received her law degree in 1981 from UNM law school.