

CollegelInvest Board Members

Giovanni V. Greco, Chair

President & CEO
The Wildlife Experience, Inc.
Parker, CO

Giovanni Greco was appointed to the Board of Directors for CollegelInvest in November 2006.

Greco is the President & CEO for The Wildlife Experience, a 110,000 square foot cultural attraction that uses film, fine art and hand-on exhibits to teach appreciation of wildlife and its habitats. Prior to joining The Wildlife Experience, Greco served CollegelInvest for nearly 10 years, most recently as Chief Operating Officer of college savings programs during which he was named one of the Denver Business Journal's "Forty Under 40" business leaders in Denver. Greco serves on the Denver Commission on Cultural Affairs, the board of directors of Denver Kids Inc, the board of directors of the Scientific and Cultural Collaborative and the Board of Governors for the South East Business Partnership.

Greco received his Bachelor of Fine Arts from the University of Colorado at Boulder, and an MBA from Regis University.

Steven J. Schwartz, Vice Chair

Vice President for Finance & Administration
Fort Lewis College
Durango, CO

Steven J. Schwartz was appointed to the Board of Directors for CollegelInvest in July 2000.

Schwartz brings to the Board over 8 years senior financial management experience in higher education. Currently Schwartz is Vice President for Finance and Administration at Fort Lewis College where he provides financial oversight of budget development, accounting, and internal audits. Other areas of responsibility include computing and telecommunications, physical plant - including capital construction, purchasing, human resources, risk management, and the College's community concert hall. Schwartz also serves as the deputy treasurer to the Fort Lewis College Board of Trustees.

Schwartz received his Bachelor of Arts Degree in Marketing from Fort Lewis College in 1992 and his Master of Business Administration from the University of Kentucky in 1994.

Richard J. Dalton

President
CoBiz Financial, Inc.

Richard Dalton was appointed to the Board of Directors for CollegelInvest in November 2006.

Dalton has been the President of CoBiz Financial Inc. since May 2003. He had previously served as Executive Vice President and Chief Financial Officer from January 1997 through May 2003. He is also a director of Alexander Management Group, a subsidiary of the Company. From August 1992 to January 1998, Dalton was the Vice President of Western Capital. From August 1992 to June 1998, Dalton also served as the President and Chief Executive Officer of River Valley Bank – Texas.

Dalton received his Bachelor of Science Degree in Business Administration from the University of Southern Colorado, and an MBA from the University of Colorado.

Patty Fontneau

Chief Administrative Officer
Holme Roberts & Owen LLP
Denver, CO

Patty Fontneau was appointed to the Board of Directors for CollegenInvest in February 2005.

Fontneau joined HRO as Chief Operating Officer in 2008 and is responsible for the overall business management of the firm. Prior to joining HRO, Fontneau was the Chief Administrative officer for The IMA Financial Group, Inc. and was responsible for the corporate strategies division and the operations of the parent company. Before joining IMA in 2004, Ms. Fontneau was VP and General Manager of the Western Service Center of TIAA-CREF, a Fortune 100 financial services company with over \$300 billion in assets. Fontneau is a member of the advisory boards of US Bank, the University of Colorado at Denver Business School, and the Colorado Leadership Alliance. She is also a member of the Mayor's Leadership Team on Early Childhood Education, the Women's Forum, and is an alumnus of Leadership Denver.

Fontneau received her Bachelor of Science in Business Administration from the State University of New York and an MBA in Finance from New York University.

James B. Haass

Executive Director, Branch Manager
Oppenheimer & Co., Inc.
Denver, CO

James B. Haass was appointed to the Board of Directors for CollegenInvest on June 2002.

Haass brings to the Board several years experience in financial and investment management. Currently Haass is the Executive Director, Branch Manager for Oppenheimer & Co., Inc.

Haass received his Bachelor of Science Degree in Finance from the University of Wyoming.

Richard E. Martinez, Jr.

President
Young Americans Center for Financial Education and Young Americans Bank
Denver, CO

Richard Martinez was appointed to the Board of Directors for CollegenInvest in April 2007.

Martinez manages bank operations, regulatory compliance and information systems and technology for Young Americans Center. He also manages the investment portfolio of the bank, the nonprofit organizations' endowment funds and directs asset/liability management. Martinez serves on the University of Denver – Bridge Project and Daniels Fund Scholarship Committees.

Martinez received his Masters in Business Administration from Regis University.

Jean Jones

President (Retired)
Girl Scouts – Mile Hi Council
Denver, CO

Jean Jones was appointed to the Board of Directors for CollegenInvest in January 2009.

Jones was President/CEO of Girl Scouts - Mile Hi Council, the 15th largest council in the U.S., for 25 years. She holds B.S. in History, Social Studies and Secondary Education from Northwestern University. She is a member of Colorado Division of Insurance Consumer Advisory Council; a trustee of the Colorado Health Institute; a past board chairperson and trustee The Colorado Trust; board member of the Colorado Institute for Family Medicine, honorary board member of the Colorado Women's Hall of Fame; past president and current member of the Rotary Club of Denver; past president; trustee of the Samaritan Institute Foundation; past president of the Women's Forum of Colorado; past commissioner/chairman of the Colorado Civil Rights Commission; Civis Princeps Award, Regis University, 2009; Denver Area Panhellenic Alumni Achievement award; First Plymouth Church Community Service Award; member of the Colorado Women's Hall of Fame; Unique Woman of Colorado Award runner-up; National Samaritan Award, Samaritan Institute; Leadership Denver Member of the Year

Katie Kramer

Vice President
Boettcher Foundation
Denver, CO

Katie Kramer was appointed to the Board of Directors for CollegenInvest in January 2009.

Serving as Vice President & Assistant Executive Director of the Boettcher Foundation, Katie Kramer has come full-circle in her relationship with Colorado's most prestigious merit-based full-ride scholarship award. Her selection as a Boettcher Scholar in 1993 supported her decision to attend the University of Colorado at Boulder, where she was a Presidents Leadership Scholar and honors graduate in her triple major of Leadership Studies, Organizational Management and Human Resources Management. In 2009, she completed her Executive MBA at the University of Denver with Beta Gamma Sigma honors.

Kramer served as the Boettcher Foundation's Director of the Scholarship Program for five years prior to assuming her current role of Vice President where she is responsible for all operational aspects of a \$230M private foundation, including the administration of over \$12M annually awarded in grants and scholarships in the State of Colorado.

Her extensive knowledge on issues relating to foundations, nonprofit management and access to higher education makes Kramer a frequent conference presenter and expert panelist in local, regional and national venues.

Ashley Burt

President
The Gunnison Bank and Trust Company
Gunnison, CO

Ashley Burt was appointed to the Board of Directors for CollegenInvest in January 2009.

Burt has been the President of The Gunnison Bank and Trust Company since May 2004 and has served in other capacities within the bank since February 1996 including serving as a Director for the holding company. He has been a Director for the Community Foundation of the Gunnison Valley since 2004, and a member of their Finance Committee. Burt has continued to serve on a variety of local and regional boards focusing on economic development and banking issues.

Burt received his Bachelor of Science Degree in Business Administration from Western State College of Colorado, and is currently pursuing his Graduate Degree in Banking from Pacific Coast Banking School at the University of Washington.