



BRIDGEWATER  
*Advisory Group*

## Investment Committee

In addition to Terry and Ethan, your investment team is comprised of tenured and credentialed wealth management professionals with decades of experience in portfolio management, trading, operations, and analysis.

### **JD Gardner, CFA & CMT | Portfolio Manager**

With a passion for developing systematic strategies and leveraging the efficiency of ETF structures, JD has revolutionized the advisory space, driven by a commitment to minimizing behavioral inefficiencies and maximizing investor outcomes. A seasoned professional holding both the CFA Charter and Chartered Market Technician (CMT) designations, JD honed his skills as a research analyst at UBS and Morgan Stanley.



### **David Wagner III, CFA | Portfolio Manager | Equities**

David is a CFA Charterholder and a member of the CFA Society of Cincinnati. He earned his BS in Accounting and BBA in Finance from the University of Kentucky. He also earned his MBA specialized in Finance from Xavier University. David is responsible for leading all equity research and analysis for the different large and small cap portfolios our team oversees. David is a regular contributor on CNBC, Bloomberg, WSJ, and Barrons.



### **John Luke Tyner, CFA | Portfolio Manager | Fixed Income**

A strong background in municipal, corporates, agencies, and mortgage-backed securities, John Luke brings his expertise as a fixed income analyst and trader to the team. His mission is to simplify the complexities in finance, creating portfolios that offer consistent returns without the emotional turmoil often associated with market fluctuations.



### **Brad Rapping, CFA | Portfolio Manager | Portfolio Reviews**

A dedicated CFA Charterholder, Brad is responsible for equity research and portfolio reviews. With a rich background in institutional value equity research and trading, he provides comprehensive analysis to advisor target exposures, fund due diligence, and various client service needs.





### **Beckham Wyrick, CFA | Portfolio Manager | Portfolio Reviews**

Beckham Wyrick serves as a Portfolio Manager and Analyst. He is passionate about finding solutions at the business and portfolio level to enhance the value proposition and improve the financial outcomes for clients. Beckham attended college at the University of North Carolina at Wilmington, where he was also a member of the men's basketball team and graduated with a Bachelor's Degree in Finance. Beckham is a CFA Charterholder and is a member of the CFA Institute and CFA Society of Alabama.



### **Mark Callahan | Portfolio Manager | Trading**

Mark most notably spent 12 years as an agency sell-side global portfolio trader, transition manager, and derivatives trader before joining the team. He managed multi-day rebalancing of some of the larger 40 Act Target Date Funds in existence across all equity market-caps both domestic and foreign. Mark graduated with a BBA in Finance from Oklahoma University and a MS in Real Estate from UT Arlington.



### **Joseph Sykora, CFA | Portfolio Manager | Private Investments**

Joseph joined the team in 2021 after seven years as co-founder and managing partner of Gallatin Natural Resources, a west Texas mineral & royalty acquisition company. Prior to Gallatin, he worked as a high yield fixed income analyst covering energy for Sterne, Agee & Leach. Joseph holds the Chartered Financial Analyst designation from the CFA Institute. He graduated with a Masters in Accounting from the University of Alabama where he was a member of the men's golf team.



### **Brett Bennett, CFA | Portfolio Manager | Portfolio Reviews**

Brett has over two decades of experience. Previously working at Envestnet and Schwab in various roles, including money manager research and institutional due diligence. Brett holds the Chartered Financial Analyst designation from the CFA Institute. He graduated with a Masters in Business Administration from the University of Colorado-Denver and received his undergraduate degree in Finance from Bentley University, where he was a member of the men's track and cross country teams.