

# **WILLIAM JENE TEBEAUX, CFP®, CFA®, CAIA®**

Principal and Chief Executive Officer  
Certified Financial Planner™  
Chartered Financial Analyst  
Chartered Alternative Investment Analyst  
**Paragon Advisors, LLC and Paragon Advisors Trust**

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## **Work Experience**

May 2007-Present      Principal and Chief Executive Officer – Paragon Advisors & Paragon Advisors Trust

Dec. 1998-April 2007      Executive Vice President and Senior Trust Officer—First National Bank

April 1995-Nov. 1998      Senior Vice President and Senior Trust Officer—First National Bank of Bryan

Feb. 1994-April 1995      Vice President and Trust Officer—First National Bank of Bryan

Jan. 1992-Feb. 1994      Certified Financial Planner and Account Executive—Paine Webber, Houston Retirement Consultant Team, Houston, Texas

Sept. 1964-Dec. 1991      Southwestern Bell Telephone/AT&T, various management positions-including line supervision of up to 500 management and union employees. Retired-Dec. 1991

## **Education and Certifications**

BS, Math and Physics      Baylor University, 1964

MBA      University of Houston, University Park, 1971 (Phi Kappa Phi)

CFP      **Certified Financial Planner**, 1988

CFA      **Chartered Financial Analyst**, 1997

CAIA      **Chartered Alternative Investment Analyst**, 2010

SEC Series 7, Series 65      SEC Registered Representative, 1992

Series 63, Series 24      General Securities Principal (Series 24), 2001

Texas Insurance      Group I, Life, Health, Accident & HMO Agent (1992) and Variable Contract Licenses      Agent (1992)

## **Current Registered Investment Advisory/Trust Responsibilities-Paragon Advisors**

- Financial planning
- Investment management of approximately \$75 million for individual clients
- Investment management of bank client portfolios of approximately \$27 million
- Trust administration and investment management for trusts totaling approximately \$75 million

Note: These figures represent growth for Paragon Advisors, LLC (established May, 2007) and Paragon Advisors Trust (established July, 2007).

## **Prior Bank/Trust Department Responsibilities-First National Bank of Bryan**

- Supervised trust department and retail brokerage department (nine trust administrators and financial counselors).
- Managed trust portfolios of approximately \$280 million and bank investment portfolio of approximately \$130 million (\$410 million total).
- Directed Department Functions:
  - Estate planning and administration
  - Financial planning
  - Investment management
  - Personal trust administration
  - Employee benefit plans
  - Guardianships
  - Self-directed IRAs
- Executive officer of the bank with associated management responsibilities

### Summary of Accomplishments (at FNB Trust Department)

- **Average annual** compound increase (from December 31, 1994 to December 31, 2006) in:
  - Trust department assets: **+19.1%**
  - Trust fee income: **+15.7%**
  - Trust accounts: **+10.9%**
 (Note: All growth generated internally with no purchases of additional assets/accounts.)
- Managed bank retirement plan assets-deductible retirement plan contributions were not allowed for '98, '99, '00, '01 and 2002 because of increases in the portfolio of pension plan assets.

### Senior College Teaching Experience

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|--------------|--|
| 1979-1982    | University of Houston-Accounting (100-200 level courses)   |
| 1982-1984    | Texas A&M University-Telecommunications (300 level courses-Full time; on loan from Southwestern Bell to help establish the telecommunications program in the Engineering College at Texas A&M).  |
| 1984-1994    | University of Houston-Mathematics and Statistics (100-400 level courses)   |
| 2009-Present | Texas A&M University-Executive Professor- Portfolio Management (course for MBA students and senior finance majors in the actual portfolio management of funds given to A&M by a former student). |

### Publications

**Operational Mathematics for Business**, R.C. Pierce, Jr. and W. J. Tebeaux, Wadsworth Publishing Co., 2<sup>nd</sup> Edition, 1983

**Operational Mathematics for Business**, R.C. Pierce, Jr. and W. J. Tebeaux, Wadsworth Publishing Co. 1980

These books were college level math books oriented toward business students.

### Professional and Civic Affiliations

- Board of Directors and President (for 1999-2000), Brazos Valley Estate and Financial Planning Council – 1996-2005
- Chairman, Wills, Gifts, and Trusts Committee, First Baptist Church, Bryan, Texas – 1996-1999
- Education Committee and Investments Committee, Trust Financial Services Division – Texas Bankers Association – 1995-1997
- Bryan Rotary Club – 1996-Present
- Co-chairman, Bryan Rotary Club Golf Tournament – 1996
- Chairman, Group Study Exchange Receiving Committee, Bryan Rotary Club – 1998
- Leadership Brazos – Selective Civic Leadership Training Program – 1995-1996
- Planned Giving Committee, St. Joseph's Regional Hospital Foundation – 1995-Present
- Member – Chartered Financial Analyst Institute – 1994-Present
- Advisory Committee of Bryan/College Station Habitat for Humanity – 1998-2005
- Board of Directors – Bryan/College Station Habitat for Humanity – 2006-2008
- Invited Grader – AIMR Chartered Financial Analyst Certification Examination – 1998-2004, 2007-Present (Grading of the CFA examination administered internationally on an annual basis-**Senior Grader – 2008-Present**).
- Co-founding Trustee and Board Member (Secretary: 2000-2001) – Bryan Independent School District Educational Foundation – 1999-2003. This is a 501(c)3 corporation whose purpose is to provide for unmet educational needs for disadvantaged/at risk children in the Bryan school district.
- Board of Directors – Brazos Valley Chapter – American Red Cross – Term: 1999-2003. Treasurer and Chairman of Finance Committee, 1998-2000.
- Board of Governance – St. Joseph's Manor (a 166 bed assisted living facility operated by the Sisters of St. Francis) 1999-2008.
- Opera and Performing Arts Society Fund Raising Committee (OPAS) at Texas A&M University – 2003-2006
- City of Bryan Investment Committee – 2005-2007
- Blinn College Foundation Board – 2004-Present (Treasurer-2007)
- St. Joseph Health Care System Audit Committee – 2005-Present
- Investment Officer and Investment Committee Member – National Independent Trust Company (a national Trust Company with assets of approximately \$1.5 billion) – 2007-2011. **Chairman of the Investment Committee – 2009-2011.**

- Board of Directors (Member of Directors Loan Committee, Nominating Committee, Compensation Committee, and Asset Liability Committee)-Brazos Valley Bank (an independent national bank with assets of approximately \$125 million) – 2007-2012. **Vice Chairman of the Board – 2008-2012.**
- Board of Directors – National Independent Trust Company (\$2.0 billion national trust company operating under oversight of the Office of the Comptroller of Currencies) – 2008-2011.
- Planning Committee-St. Joseph Health Care System- 2009-Present
- Member-Chartered Alternative Investment Analysts Association- 2009-Present
- Finance Committee- St. Joseph Health Care System- 2010-Present
- Investment Committee-St. Joseph Health Care System (**Chairman**)- 2012-Present
- Board Member- Brazos Healthcare Council of St. Joseph Health System- 2012-Present