2012 Institutional Investor NEWS

RISING STARS OF MUTUAL FUNDS

Brad Alford, CFA

Founder and Chief Investment Officer
Alpha Capital Management

Accreditation: Chartered Financial Analyst and Certified Financial Planner
Education: B.S. in Corporate Finance and an M.B.A. from the University of Alabama
Mentors: Richard Jenrette, found of Donaldson, Lufkin and Jenrette, and trustee of the Duke Endowment; Russell Robinson, founder of Robinson, Bradshaw & Hinson, and trustee of the Duke Endowment.

Brad Alford founded Atlanta's Alpha Capital Management in 2006, and oversaw the firm's first foray into mutual funds a little more than a year ago. He currently runs two mutual funds that seek to provide hedge fund strategies with the increased liquidity, regulatory oversight, and lower fees of mutual funds.

He's been successful in getting his funds added to platforms such as Charles Schwab, Fidelity, E*Trade, Envestnet, Pershing, SEI and Vanguard and is working to get them on others.

Before founding Alpha, Alford served as a managing director at Atlantic Trust. Before that, he was director of investment advisory services at MyCFO, serving the high-net-worth market. From 1995 to 2000, he was managing director of the Duke Endowment, where he expanded the school's alternative asset portfolio 10-fold to more than $1 billion. While at Duke, Brad also founded and built an internet company, IPO Lockup.com. IPO Lockup.com was the first website to track and analyze the effects of lockup expirations on initial public offerings (IPOs). He was the director of endowment investments for the Emory University Endowment from 1989 to 1995.