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Lasallian Scholars Learn About Mutual Funds from Ultimus *Seasoned Industry Pro Shares Knowledge*

CINCINNATI, OHIO – DECEMBER 22, 2016 – [Ultimus Fund Solutions®](#), LLC (Ultimus) is privileged to partner with [La Salle High School](#) and the students in the [Lasallian Scholars Institute](#) (LSI), a four-year program for high-performing students, to provide an introduction to mutual funds. With 35 years of industry experience, [Bob Dorsey](#), CEO and managing director of Ultimus, taught two 90 minute classes on the basics of mutual funds and designed a portfolio management project for the students to participate in.

The La Salle students formed teams to research and select portfolio companies and then were asked to present their portfolios to a team of Ultimus professionals. During the presentation of their final projects at the Ultimus office, a panel of evaluators, including Bob Dorsey, Theresa Bridge and Brian Lutes, all from Ultimus, along with their teacher Mike Holman provided valuable feedback to the students.

In addition to the presentation, Ultimus provided students the opportunity to tour the offices and meet with senior department managers. Each department provided an overview of its operations and then conducted a Q&A with the students, encouraging students to learn more about mutual funds and general business activities.

“Being a graduate of La Salle High School, I can appreciate the need for community and company involvement to enrich the student’s education process,” said Dorsey, “Engaging with these students in this hands-on way creates a unique opportunity for students to see different areas of financial services, keeps me in touch with the next generation of professionals and fosters interest in our industry. It also provides the students insight into a real business experience. We’re delighted to participate in this project!”

“Our students benefit greatly each time a business like Ultimus takes the time to get involved,” commented Mike Holman, Director of LSI at La Salle High School, “The students receive a taste of the real business environment, a project to research and present, and an opportunity to work together as a team to create portfolios for prospective clients of differing financial needs and outlooks. Giving students the opportunity to present in front of business professionals in a corporate setting, there is no substitute for this type of hands-on experience.”

LSI forms industry partnerships in the fields of Finance, Engineering, Global Business, Healthcare and Information Management and Technology, which creates a dynamic learning environment, develops community relationships and molds young leaders. Students learn in-depth career information, see inside information about Cincinnati-based employers, and get inspired by some the most qualified individuals in specific industries.

The LSI program provides students more than 100 experiential-based, industry-specific learning opportunities. This training complements more than 350 hours of professional development training in the areas of public speaking, effective presentations, group collaboration, project and time management and interpersonal communications.

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About Ultimus

Ultimus Fund Solutions provides highly customized and comprehensive middle and back office services to midsize and small investment advisors. Ultimus offers service solutions for mutual funds, including fund organization, fund administration, fund accounting, transfer agent and distribution services for both open- and closed-end funds, plus turnkey solutions for collective investment trusts.

Ultimus' middle office service solution for separately managed accounts and private funds encompasses managing the technology infrastructure and operations required to manufacture the data needed for front office decision support platforms, enabling delivery of detailed reporting to advisors, investors, and regulators. Ultimus' comprehensive services are performed by teams of accountants, attorneys, paralegals and other professionals with a wealth of financial services experience. Ultimus, headquartered in Cincinnati, Ohio, currently services 89 clients nationwide with 210 funds and over \$50 billion in assets under administration. For more information, visit www.ultimusfundsolutions.com.